




# Training Guide



Version 4.0



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## GETTING STARTED



The purpose of this *Training Guide* is to help you navigate key features and functions to manage your organization's applicant process, with **balanceTRAK software**:


-  Create **Requisitions** to develop, post, and track job openings
-  Manage and interact with **Job Seekers**
-  Generate **Reports** and export data on applicants and system activity
-  (Administrators) Administer **Settings** for software templates and system options

## ON-LINE HELP

Because not all features or operations will be described in this *Training Guide*, please access on-line resources for more comprehensive information. Guidance can be found by simply clicking the  **Help** icon in the *software header*, which provides access to:

- **Documentation** (including Help topics and downloadable guides)
- **Product Support** (Contact information also appears in this guide, below.)

The immediate **Help** Documentation screen supports the currently accessed page; however, additional topics are available from: **Help** > [Table of Contents](#).

 **Video Tutorials** for topics, as available, are accessible from the adjacent **Video** icon.

## BERKSHIRE PRODUCT SUPPORT

Technical support for **balanceTRAK** is available by calling (800) 882-8904, during business hours, excluding holidays:

8:30 a.m. – 8 p.m. ET, Monday – Thursday; and 8:30 a.m. – 5 p.m. ET, Friday

The email address for technical assistance is: [product.support@berkshireassociates.com](mailto:product.support@berkshireassociates.com).


Berkshire Associates Inc.  
8924 McGaw Court  
Columbia, MD 21045

Instructions for allowing Berkshire Product Support to view your software screen are located in the [Appendix](#).


*Some options have been installed specifically for your organization during Implementation. If you have questions or want to request changes, contact your balanceTRAK Administrator or Berkshire, as appropriate.*

## ACCESSING BalanceTRAK

### FIRST STEP: LOG INTO BalanceWORKS

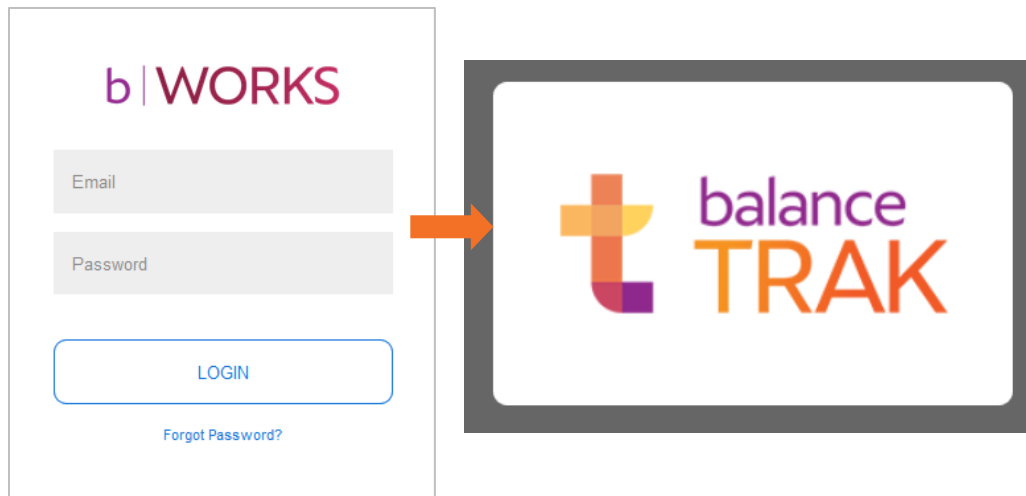
**BalanceTRAK** is designed for operation in a recent browser, both for usability and security purposes. For details on browser support, visit our  **Help** Website at: [help.baiworks.com](http://help.baiworks.com).



From any computer with an active Internet connection, go to the following address: [baiworks.com](http://baiworks.com).


This will open the  **balanceWORKS** login page, which provides entry to the Berkshire software applications your organization has purchased, limited to, or including, **balanceTRAK**.

**Quick Tip:** **BalanceWORKS** refers to the interface platform that supports all of Berkshire's HR software products.

Enter your email (address) and the password, as assigned to you by the Administrator, and click the **Login** button. *Please note the password field is case sensitive.*



The  **balanceWORKS** >  **Home page** will display. Hover your mouse over the **balanceTRAK** logo, and click the **TRAK** button.

**Reminder:** If you have purchased additional **balanceWORKS** software products, the platform's  **Home page** will also display buttons to access the other application(s).



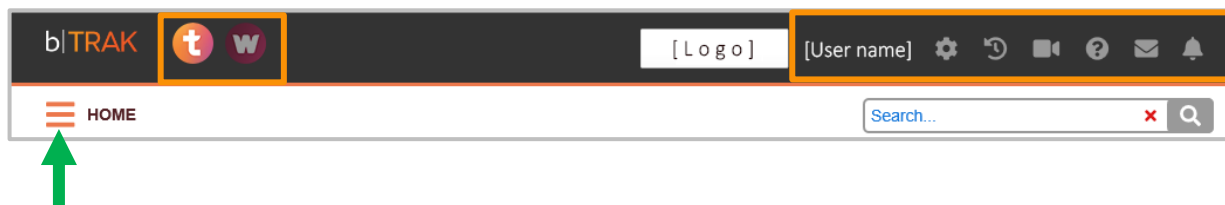
**For Single Sign-On users (where installed by client organization):**

If **balanceWORKS** is included in your organization's single sign-on chain, navigate to that Web page, log in as instructed, and select the application.

**FORGOT PASSWORD?**

Your login ID will be your email address. If you forgot your email address, click on the link **Forgot your password?**.

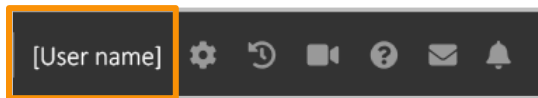
From there you will be instructed to follow the steps to restoring or resetting your password.

**HEADER OVERVIEW DIAGRAM**

The **b|Trak** software header at the top of the screen offers universal controls:

Icons on the <i>left side of this bar</i>	Links and icons on the <i>right side of the bar</i>
<b>Switch Applications</b> per displayed icons	<b>User name &gt; Contact Information, Security, Settings</b> AND <b>Logout</b>
<b>Expand/Collapse the <a href="#">side navigation menu</a></b>	<b>System Tools (Administrators)</b>
	<b>(Page view) History</b>
	<b>Video Tutorials</b>
	<b>Help &gt; Documentation, Support, Security</b>
	<b>Job Seeker Messages</b>
	<b>Event Alerts</b>

## BalanceTRAK USER ACCOUNT SETTINGS



By selecting the your [User name] from the *software header*, you can update information, manage your Password, set up automatic notifications, and determine the proper time zone, among other actions.

### Security

One of the first places to visit under your [User name] is **Security**, which is comprised of tabs for **Password** and **Security Questions**.

### Time Zone



Your location may have a different time zone then the one initially placed into the system for your entire organization (Eastern) or the one set by your client-side Administrator. This setting can also be found under your [User name]. From there, go to **Settings > TRAK > Settings**.

1. In the first menu option below **General**, choose another time zone from the provided drop-down. You may also toggle on OR toggle off whether to rely on daylight savings time.
2. When the settings are complete, click the **Save** button.

## VIEW NOTIFICATIONS



The last two *header* icons provide one-click access to recent communications, including

- Inbound  Messages from job seekers, including text and emails
- AND
- Alerts about job seeker and requisition  Events (e.g., a job seeker applied, a requisition is closing, a requisition is awaiting your approval).

From these access points, each user can also [Go to Inbox](#) and click a [Settings](#) link to personalize the delivery of automatic notifications.

## Notification Delivery Settings

The system can communicate with you about topics you select, via the method of your choice, and at the frequency you prefer.

1. Via either of the two notification icons, visit the [Settings](#) link to adjust the delivery preferences.
2. Before making changes to the Notification menus, peruse the Requisition, Job Seeker, and Approval Process lists to see which communications you are interested in.

All notifications are available for delivery by:


- Email (to Outlook or other system)
  - Alert (to **balanceTRAK's** notification center Inbox)
- a. ☒ Check off (or deselect) the appropriate items, using the Email and Alert *columns*.
  - b. Where shown for high-volume events, make a selection for Email Frequency, either:
    - Immediately (individual listings)OR
    - Daily (cumulative daily listings)
3. Click the **Save** button to apply the settings.

**Important Tip:** When determining whether and how to implement notifications, consider such impacts as the number of job applications your organization receives or the number of requisitions opened on a regular basis.

A small organization with a single HR point person and fewer hiring activities may benefit from setting up more notifications. Meanwhile, an employee at a large organization may benefit from fewer or less frequent notifications.

## HOME PAGE

### DASHBOARD OVERVIEW

The  **Home**, or landing, page is designed as a **Dashboard** to give you quick and easy access to pertinent metrics and alerts through “widgets,” whose settings and arrangement can be personalized at the organization and user levels. Some examples of key objects include:

- Pending Approvals
- Calendar
- Saved Searches
- To-Do List

### Dashboard Graphs

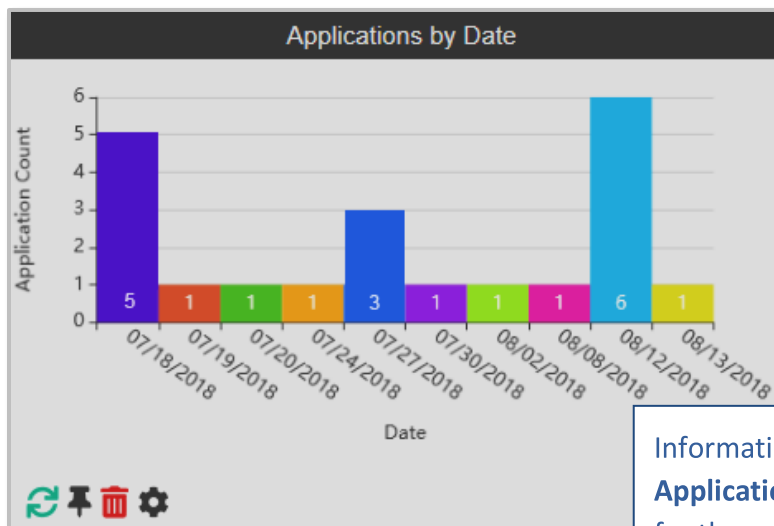
There are also several metrics available at your fingertips to keep you up-to-date on recent activity. For examples, these graphs include:

*For Job Seekers –*

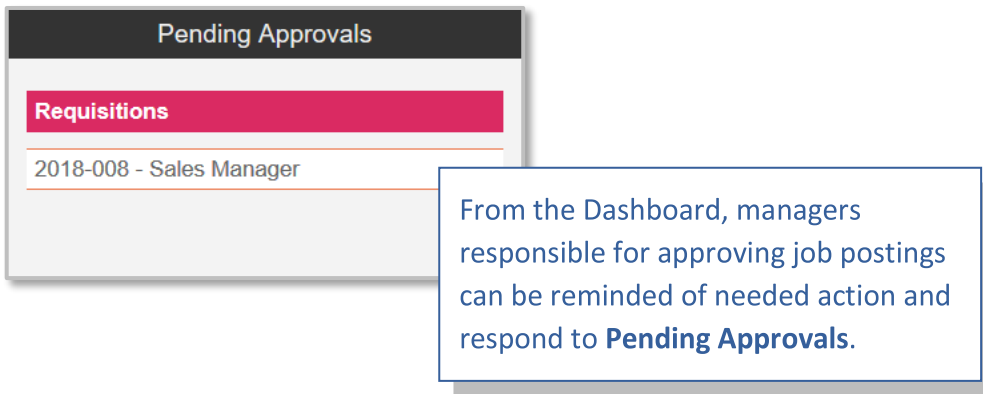
- Applications by Date (shown below)
- Job Seeker Heat Map

*For Requisitions –*

- Requisitions by Source
- Time to Fill



Information for number of **Applications by Date** is shown for those days during which at least one was received.



## Pending Approvals

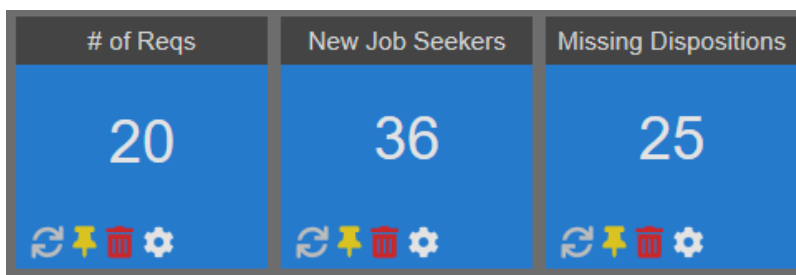
If an Approval Process has been initiated for a requisition and you have been selected as an approver, the Dashboard can display this alert in the **Pending Approvals** object (shown above). To review – and approve or disapprove – the requisition or candidate, click the appropriate item, and follow the steps to approve or decline to approve.

See [Monitor Requisition Approvals](#) for more details about working with approvals.

## Saved Searches List

If you run regular Searches, involving specific job seeker or requisition parameters, you can save time and effort by accessing these views from the 🏠 **Home page Dashboard**.

For information on how to create and save advanced Searches, refer to: [Perform an Advanced Job Seeker Search](#).



## Requisition Counters and Lists

Requisition-based counters and lists keep you knowledgeable about workload, job openings requiring attention, and other data points. These objects include the following examples, among others:

*Counter Tiles*

- **# (Number) of Requisitions** (shown above, at left)
- **Open Requisitions**
- **Requisitions Closing Soon**

*Lists*

- **Longest Open Requisitions**
- **Requisitions Closing Soon**

**Job Seeker Counters and Lists**

The Dashboard summarizes information to help you understand the job seeker pool, follow job seeker and requisition progress, and address tasks. These objects including the following examples, among others:

*Counter Tiles*

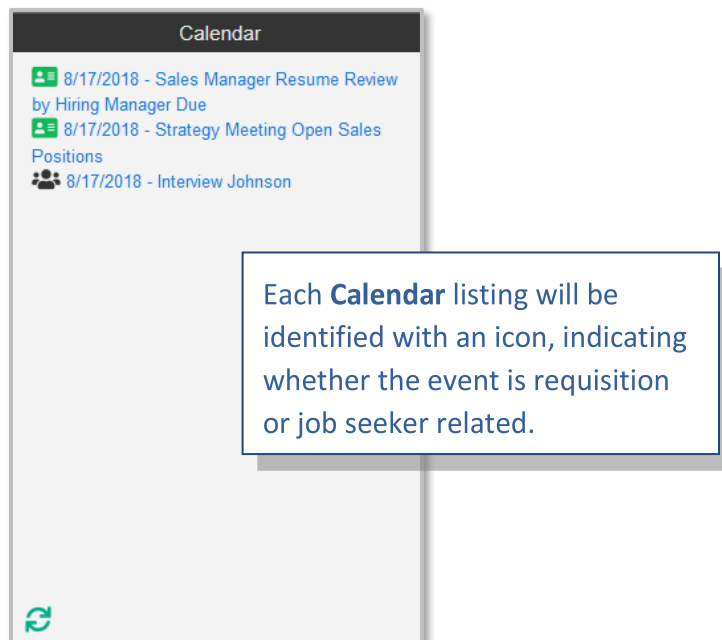
- **New Job Seekers** (shown above, center)
- **Job Seekers Missing Disposition Codes** (shown above, at right)

*Counter Tiles and Graphs:*

- **Job Seekers by Source or Stage**
- **Percent Dropoff**

*Lists*

- **New Job Seekers**
- **Job Seekers Awaiting Screening**



## Event Calendar

**Calendar** events can be scheduled within **balanceTRAK** and included in your office calendar program, such as Microsoft Outlook. Your most current events scheduled will be shown on the **Calendar** widget for your reference.

To add events to your calendar, refer to the [Requisition](#) and [Job Seekers](#) chapters, specifically for information on the **Calendar** tab within a Requisition or the **Interview > Calendar** tab in the Job Seeker record.

**Cross-reference:** For a more complete rundown on the available widgets, refer to the companion document, *Guide to BalanceTRAK Widgets*, available in the **? Help > Library**.

## Tools for Working with an Individual Widget

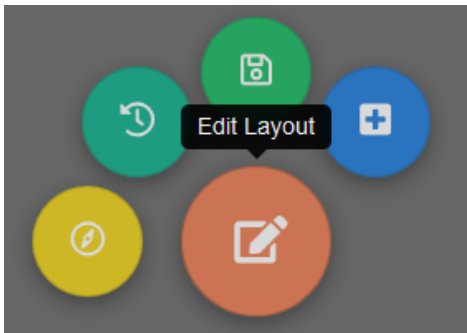



Each widget includes a lower *toolbar*, controlling the following actions, from left to right:






- **Refresh** – Update the widget to account for the most recent data inputs
- **Pin** – Lock the object to the Dashboard
- **Remove** – Delete the object from the Dashboard (Objects remain available in the [Add Widget](#) menu.)
- **Settings** – Based on the widget's subject matter, customize its content

The latter three icons only appear when the Dashboard is in **Edit** mode, which is described in the next chapter.



## PERSONALIZE THE DASHBOARD

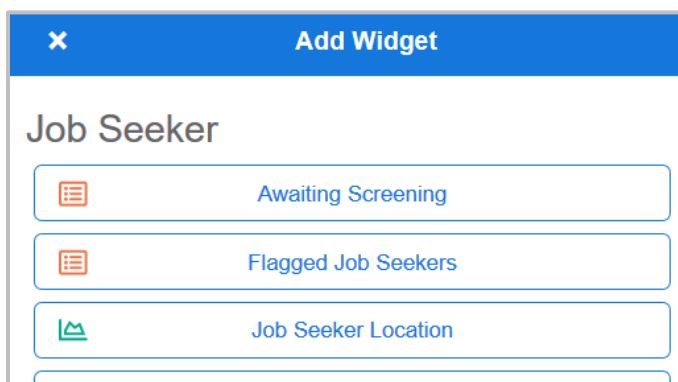


On the Dashboard's lower right, a *tool palette* can be activated by clicking the large, central  **Edit Layout** icon. The tool palette is comprised of the following buttons, in clockwise orientation:



-  **Edit Layout** (center)
-  **Calculate Optimal Layout**
-  **Restore Default Layout**
-  **Save Layout**
-  **Add Widget**

### Add a Widget to the Dashboard

With the *tool palette* active, click the  **Add Widget** icon (shown in the screenshot above) to maximize the Add Widget menu on the right side of the  **Home** page.

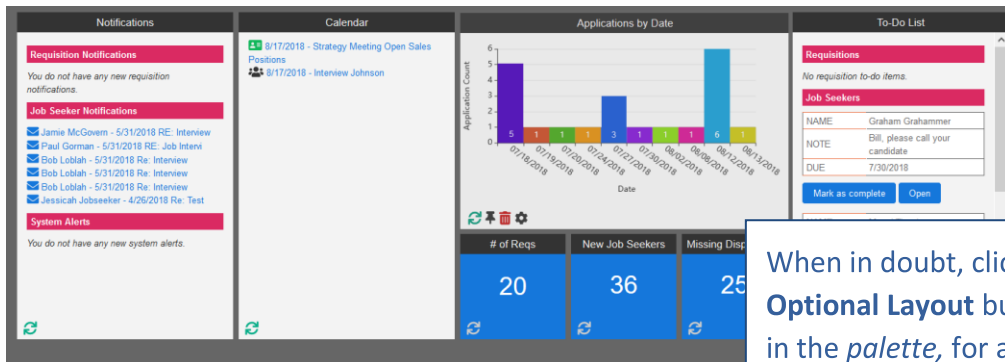


Review the provided options, and click on the pane for the desired widget. When finished:

- Click the  **Close** icon, located in the *menu header* to return to the full Dashboard view.
- Revisit the *tool palette* to  **Save** the layout.



## Organize Objects on the Dashboard

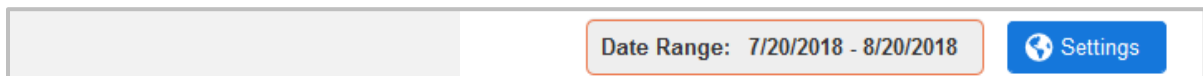


While the default Dashboard layout can be retained (and restored at any time), the layout can be personalized by each **balanceTRAK** user, for his or her everyday needs. The Dashboard layout can include all of the available widgets or a just a few. Dashboard objects can also be dragged and dropped into new locations, “snapped to” a grid layout.

## Restore the Default Layout

The Dashboard can be restored to your organization’s default view by activating the *tool palette*, and selecting the **Restore Default Layout** button.

## GLOBAL SETTINGS FOR DASHBOARD CONTENT

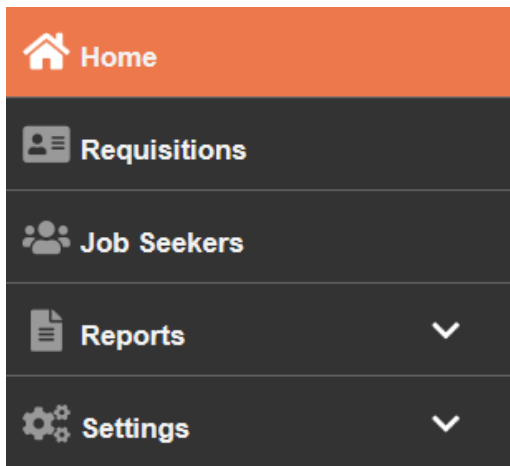


Preferences to filter **Dashboard** content and automate the data refresh interval are in place to ensure the information displayed is relevant and timely for you and your colleagues. These Global Settings are determined at the client organization level and, if authorized, they can be controlled at the individual user level.

As shown above, the **Settings** button is located above the **Dashboard**, in the *page header* on the right. Click the button to display the Global Settings menu:

1. Make Selections for **Date Range** (Relative or actual); then ☒ check the box to cascade the Date Range to all widgets. (⚙️ **Settings** for an individual widget can also be accessed to set the Date Range for that widget.)
2. (Optional) ► Expand a Filter *bar* to personalize the data to show in widgets, by up to three Requisition Fields (e.g., Recruiter, Hiring Manager, State).
3. From the provided drop-down, choose the **User Access Level** that represents your Location, Department, or other unit. This setting will determine what User Access Codes will be displayed. User Access Codes represent Locations, Departments, or other units by name (e.g., Buffalo: Payroll, Retail Site 321).
4. ☒ Check off the **User Access Code(s)** to represent the unit(s) under your purview. Again, ☒ check the box to cascade the changes to the entire Dashboard.
5. Edit the Auto Refresh Interval (in minutes), particularly if **balanceTRAK** data in your system updates frequently.
6. Finally, press the **Save** button, located at the bottom of the menu, to apply the parameters to the Dashboard.

## SIDE NAVIGATION MENU



☰ When expanded, the *side navigation menu* takes up the left side of the working area on every page. In addition to providing return access to 🏠 **Home**, the *side navigation menu* links you to each **balanceTRAK** activity area:

- 📋 **Requisitions**
- 👥 **Job Seekers**
- 📄 **Reports**
- ⚙️ **Settings** (Administrators only)

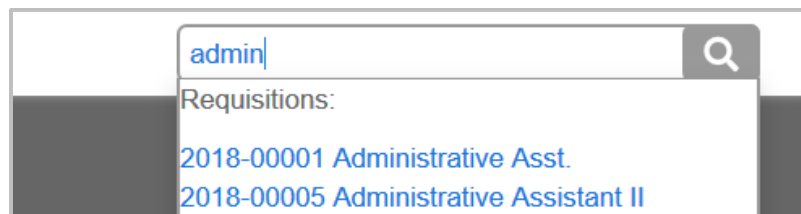
## QUICK DATA SEARCH

While you are working in 📋 **Requisitions** and 👥 **Job Seekers**, the *page header* will display a simple 🔍 **Search bar** on the *right side*. This **Search** is an aid to finding basic data quickly:

- 👥 Locating a job seeker by first or last name
- 📋 Searching for a job title or number to access a requisition

To locate job seekers by detailed information, [Perform an Advanced Job Seeker Search](#).


Enter a few letters of a search-term, and the system will recommend matches in the provided drop-down:



While Search results are displayed, click the ✖ **Clear Search** icon to restore the full display.

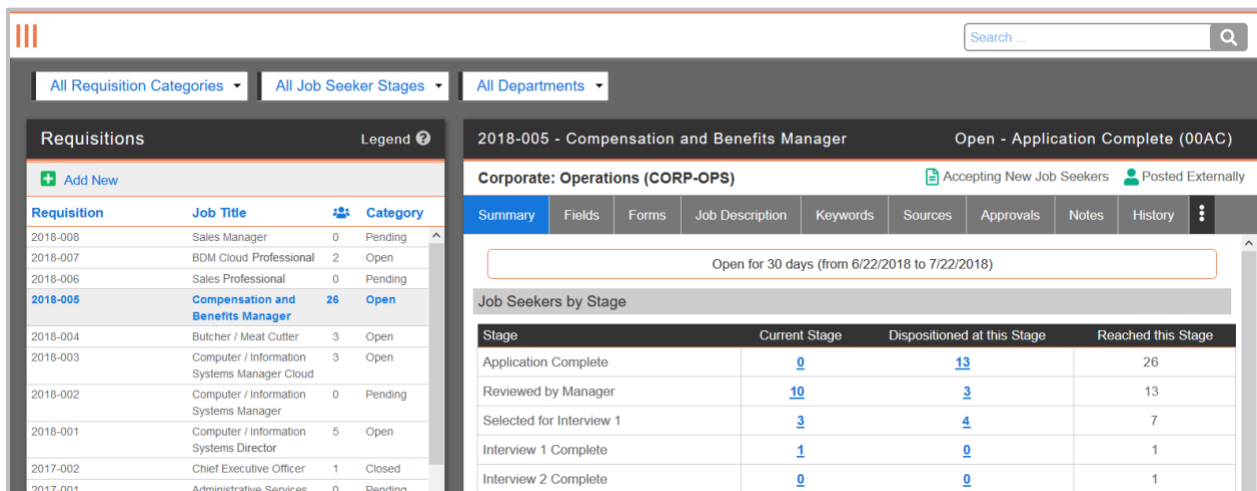
## MANAGE REQUISITIONS

### NAVIGATING THE WORKSPACE

The nucleus of **balanceTRAK** is the Requisition, or the job posting. In **balanceTRAK**, the  **Requisitions** module helps you at two levels:

- (1) **Organize and track job openings as a whole** to understand your organization's HR workload and performance
- (2) **Handle logistics and track each job requisition** so that a hire can ultimately be made

While having access to both a list of openings and detailed requisition records, you can manage the hiring workflow, while **balanceTRAK** allows both you and your colleagues, whether recruiter or hiring manager, to access only the information you need.



The screenshot displays the balanceTRAK Requisitions workspace. The left pane shows a list of requisitions with columns for Requisition ID, Job Title, Category, and Status. The right pane provides a detailed view of the selected requisition, including its title, status, and a table of job seekers by stage.

Requisition	Job Title	Category	Status
2018-008	Sales Manager	0	Pending
2018-007	BDM Cloud Professional	2	Open
2018-006	Sales Professional	0	Pending
2018-005	Compensation and Benefits Manager	26	Open
2018-004	Butcher / Meat Cutter	3	Open
2018-003	Computer / Information Systems Manager Cloud	3	Open
2018-002	Computer / Information Systems Manager	0	Pending
2018-001	Computer / Information Systems Director	5	Open
2017-002	Chief Executive Officer	1	Closed
2017-001	Administrative Services	0	Pending

Stage	Current Stage	Dispositioned at this Stage	Reached this Stage
Application Complete	0	13	26
Reviewed by Manager	10	3	13
Selected for Interview 1	3	4	7
Interview 1 Complete	1	0	1
Interview 2 Complete	0	0	1

As shown above, the screen is divided into two windows:


**LEFT:** The first window on the left is the list *column*, serving as the directory for all existing requisitions. Also available here — the button for adding a new requisition is located in the *column header*.

**RIGHT:** The *detail view* on the right, corresponds to the requisition that is highlighted in the list *column*. This window provides workspace for the individual requisition.

Both of these windows will be described further, as you move along in this training session.

However, because the hiring process typically depends on creating a job posting, this manual begins by guiding you through the process of adding a requisition to the system — from scratch or by applying a template — to include forms, keywords, and sources.



## Introduction to the Add New Requisition Wizard

Through a series of connected menus, **balanceTRAK's**  **Add New Requisition** wizard helps you build job posting content and assemble necessary requisition components. As the requisition preparer, you can even save the draft and complete it later. (Note: Only one draft can be saved per user in the system.)

Furthermore, you can take advantage of dynamic settings to automate aspects of the requisition lifecycle — allowing the system to open, post, and/or close the job announcement, based on appropriate actions or variables.


**Some organizations choose to populate the software with Requisition Templates**, meaning that some components of the new requisition will have been defined by your organization in advance. In this case, you would review, and perhaps edit, information the system has “filled in” for you, then develop any remaining components.

**Or you may create requisition from scratch.** Even those creating an “original” requisition can benefit from components that have been stored in the system libraries for you, such as job descriptions, forms, and approval processes.

**Cross-reference:** For information on administrative functions and templates, please refer to  **Help** > *Table of Contents* >  *Settings (for Administrators)*, available on line.

With the wizard, you can:

- **Identify the requisition** by entering basic information
- **Select or develop the job description**
- **Include an approval process** (if your organization requires one)
- **Select forms** for the job seeker to complete
- **Choose job boards or sites** to be tapped as recruiting sources
- **Determine keywords** to score job seeker resumés
- **Establish workflow options** for posting the job announcement

While much of the requisition will be developed at this time, you can return to it later and make changes to an existing requisition, via the  **Requisitions** module. Of course, you will also interact with the requisition there, as it moves through its lifecycle.

## ADD A REQUISITION

As shown below, begin to create a new requisition by clicking the **+ Add New** button, located above the Requisition list.



**Setup**, the first step, will then be highlighted in the *side navigation menu*; the corresponding work area will be displayed in the large window to the right.

The *side navigation menu* also outlines the full sequence of requisition-building steps, from top to bottom, for one-click access.

### 1. Setup the Requisition

Let's begin with the first step, **Setup**:

 A screenshot of the 'Setup' form. On the left is a vertical sidebar with a dark gray background and white text, listing steps: 'Setup' (highlighted with an orange bar), 'Details', 'Job Description', 'Approval Process', and 'Forms'. The main area has a light gray background. It contains two drop-down menus: 'Department' and 'Job Code'. To the right of the 'Job Code' menu is a green button labeled 'Add Job Code'. Below these are two radio buttons: 'Use a template' (unselected) and 'Enter new information for this requisition' (selected).

a. From the provided drop-down, select the Department (or other unit, e.g., Division).

b. From the second drop-down, select the:

- Job Code

OR

- *(Users with adequate permissions)* **Add A New One** – Click this button, and make entries for the displayed fields, including Job Code and Job Title (plus others, depending on your organization's nomenclature). The field will be added to the system's Job Code [Reference table](#).

**Setup**

**Details** Department: CORP-HR - Corporate: Human Resources

**Job Description** Job Code: 12HRM - Human Resources Manager **Add Job Code**

**Approval Process**

**Forms**

**Sources**

**Keywords**

**Workflow**

**Posting Dates**

**Summary**

☐ Use the last requisition information supplied for 12HRM - Human Resources Manager (2018-009 - created on 8/23/2018).  
Note: Dates will not be copied, and the most recent version of form templates will be used.

☐ Use a template

☒ Enter new information for this requisition

If either a prior Requisition or a Requisition Template exists in the system, you can choose one during Setup, which will complete all, or part of, the Requisition's information, such as Details, Approval Process, Forms, Sources, and Keywords.

**Back** **Previous Step** **Next Step**

c. Using the provided radio buttons, choose one of three methods for creating the requisition:

- Use the last Requisition created for the Job Code

*This option displays if applicable.*

- Use a Template

*If Requisition Templates are in place, the requisition will be populated for you, with the exception of the job description. The provided information can be reviewed, and where allowed by the system or your software Implementation, you can make changes to customize the requisition.*

OR

- Enter new information for this Requisition

*This final choice is the default selection.*

When finished, click the **Next Step** Button.

---

## Navigate through the Wizard



As introduced on the **Setup** screen, each work area will also present a *navigation bar* below the work area. Intuitively, the *bar* will display **Back (Setup only)**, **Previous Step**, and **Next Step** buttons, so you can move through each step in logical order.

---

## 2. Enter and Review Details

The second step, and bar in the *side navigation menu*: **Details**.

This task area involves entering **Details**, or identifying information for the Requisition. Some of these fields, and their order or grouping, may be specific to your organization.

- a. In the field for **Posted Job Title**, enter the title as you would like it to display to job seekers.
- b. Enter the **Type of Position** and the **Number of Positions**.
- c. Enter an optional **Salary Range**.
- d. A **Recruiter** may be specified by numeric or text entry, which is typically required if multiple users have permission to open requisitions. A **Hiring Manager** may also be entered.
- e. Enter Location information, such as **City, State, Zip Code**, and **Country**.

While developing the requisition **Details**, the following fields are required:

- Location
- Job Code
- Type of Position
- Number of Positions
- Posting Start Date

Other required fields may include: Grade, Job Group, and Recruiter.

Click **Next Step** to save the information and move on to: **Job Description**.

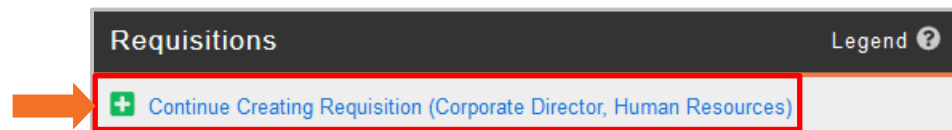


## Save/Return or Discard the Draft Requisition



Press the **Save for Later** button, in the *lower navigation bar* to exit and save the draft requisition in the current state.

After the draft is saved, a link to **+ Continue Creating the Requisition [Job Title]** will display in **Requisitions**, in the list *column header*.



The system will navigate automatically to the last step you accessed.

## 3. Select (and Edit) the Job Description

As part of the **+ Add New Requisition** wizard, this third step involves bringing in or creating the Job Description, known as the **Full Description** in **balanceTRAK**. Accordingly, the **Full Description** screen is divided into sections by topic, with each section containing a text field (as shown in the screenshot below).

For organizations having the grid view in place for the Job Posting page, you can also navigate to an additional tab and include a **Short Description** to introduce or describe the opening.

### A. Determine a Method for Developing the Job Description

When a **Full Description** for the job title is detected by the system, this option will be suggested for you. The recommended job description may originate in the **balanceTRAK** library or it may be the most recent one found to match the job title.

If an existing job description is not available, a new one can be developed, using text entry or “copy and paste.”

**Quick Tip:** *You may want to start with external content that has been saved in a Word file and bring it in, section by section. To do so, have windows open for both the source document and **balanceTRAK's** Job Description tab.*

First, copy the text within the external document. Then, click your mouse in the appropriate section, and select **Paste from Word** from the word processing *toolbar*. (This icon is shown in the screenshot below, outlined in red).

## B. Review (and Edit) the Job Description

With either entry method, the resulting content can be appended, edited, and formatted in **balanceTRAK**, with the help of a pop-up word processing *toolbar* (shown below). Simply click in the text field under a heading to enable editing.

The screenshot shows the 'balanceTRAK' job description editor. At the top, there are two tabs: 'Full Description' and 'Short Description', with 'Short Description' being the active tab. Below the tabs, the form is divided into three main sections: 'Description/Job Summary', 'Responsibilities/Duties', and 'Required Skills'. The 'Description/Job Summary' section contains a paragraph of text. The 'Responsibilities/Duties' section contains a bulleted list of responsibilities. The 'Required Skills' section contains a bulleted list of skills. A green rectangular box highlights a word processing toolbar located within the 'Responsibilities/Duties' section. This toolbar includes icons for cut, copy, paste, undo, redo, bold, italic, strikethrough, text color, background color, bulleted list, numbered list, link, unlink, and a help icon. The text in the 'Responsibilities/Duties' section is partially visible and appears to be in a rich text editor format.

**Quick Tip:** For more information on each tool in the toolbar, hover the mouse over an icon to display a caption.

## C. Set up Job Posting Text (Optional Short Description)

The Job Posting page offers a “block” view, providing space for “teasers” that introduce each job opening and encourage the job seeker to apply. To support this layout, the **Short Description** tab, serves as the placeholder for this content.

## D. Save the Job Description

Based on varying user permissions, job description content can be saved:

- For the new requisition only
- As the job code default for all new requisitions with the same job code  
OR
- As the default and additionally applied to all open or pending requisitions

When finished with the **Job Description**, click the **Next Step** button, and proceed to: **Approval Process**.

## 4. Determine the Approval Process

While some **balanceTRAK** clients will not require an approval for a requisition to post a job opening on line, those who have this practice in place will build an **Approval Process** for the new requisition.

The **Approval Process** will involve both the requisition preparer/owner, who initiates the approval request AND one or more decision-makers, who will respond to the request. In addition, other users may have permission to view who approved the requisition or how far the process has progressed.

Begin by considering the best approach to developing the process:

- Apply a Requisition Template that includes an Approval Process (If one has been selected during **Setup**, the screen will already be completed)\*
- Select an existing Approval Process (if available)\*

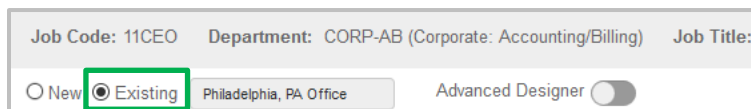
OR

- Create a unique process for the requisition

\*Keep in mind your organization may have templates in place that predetermine the approval process, while others may limit the menu options here to predefined approvals.

### Apply an Existing Approval Process

To use this method, select the radio button in the upper toolbar for: Existing.



The screenshot shows a toolbar with the following elements: 'Job Code: 11CEO', 'Department: CORP-AB (Corporate: Accounting/Billing)', and 'Job Title:'. Below these are two radio buttons: 'New' and 'Existing'. The 'Existing' radio button is selected and highlighted with a green box. To the right of the radio buttons is a text field containing 'Philadelphia, PA Office' and a toggle switch labeled 'Advanced Designer' which is currently turned off.

Then choose an entry from the adjacent drop-down to load the process.

The selected Approvers will display in the right-hand *column*. If the displayed Approval Process is correct (or locked to prevent editing), move directly to the **Next Step**, assembling **Forms**.

### Develop a New Approval Process

The **balanceTRAK** user with appropriate permissions can develop a unique Approval Process. This Approval Process will only apply to the particular requisition.

First, click the radio button for: New (circled below). Then select Approvers, as described below.

### Select the Approver(s)

Begin by reviewing the Approvers list in the left-hand *column*. Then:

1. Highlight an approver, and dashed drop area in the right *column* will appear. Then drag and drop the user into the dashed area, using the provided *name bar*:

2. (Optional) To create a Group of Approvers, click the **Add Group** icon, located above the drop area (depicted above).
  - a. The Group area will become the drop area for multiple users. Compose the Group.
  - b. Click the radio button for:
 

Require 1

OR

Require All
3. Adjust the order of the name bars and/or Groups, as necessary, also using the drag-and-drop method.

Click **Next Step**, at the bottom of the page, to save the Approval Process in the draft Requisition and continue to the **Forms** tab.

---

## 5. Associate Forms with the New Requisition

First, let's begin with a review of form types. Keep in mind your organization will have a workflow in place, establishing what forms are shown to the job seeker – in addition to the Application – when the job seeker responds to the Job Posting. One (or more) forms must be associated with the requisition for it to post on line.

### Form Types

#### Prescreener

Preceding the Application, the Prescreener contains questions whose answers determine whether a candidate meets the minimum qualifications for a job opening. If so, those job seekers exceeding the minimum threshold will be moved on to the Application.

Although the use of a Prescreener is recommended as a best practice, this form is optional.

#### Assessment

If your organization uses testing to screen applicants, an Assessment can be completed by the job seeker and scored by the system with Pass or Fail.

Also optional, the Assessment can be randomized to show different, rotating questions to job seekers who apply.


#### Application

An Application form collects the majority of information used to determine a job seeker's suitability for hiring, including employment and education history.

#### Self-Identification

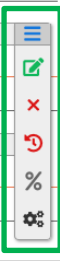
Shown to the job seeker at the beginning of the process or after the Application, the Self-ID forms allow the job seeker to voluntarily disclose race, gender, Veteran, and/or disability status. These forms are required for contractors to the Federal Government and other employers that are covered by Federal law.

During the software Implementation, basic Prescreener, Application, and other

**Form Templates** are added to **balanceTRAK** and stored in the  **Settings** module, for your use and managed by your client-side Administrator.

When adding **Forms** to the new requisition, the available selections will be located in the **Form Templates** column to the left, organized by form type, as shown below. More forms can be displayed by clicking the **Down** caret in the *form type header*.


Form Templates	External
<b>Prescreener</b>	
General Prescreener (Eligibility for Employment)	Prescreener
Management Eligibility	General Prescreener (Eligibility for Employment)
<b>Application</b>	
Application Form	Application
Internal Application	Full Application
Full Application	
<b>Other</b>	
References	Other









### Drag and Drop Method

To associate a form to the requisition, simply drag it from the *left column* to either the **External** (or **Internal**) *column* on the right. A dashed box will indicate the drop area.

Only one form per type can be included.

Each included form will have a *toolbar* available by clicking the  **Expand** icon to the right:

-  **Edit** – Update the form’s questions.
-  **Remove** – Return the form to the **Form Templates** *column*.
-  **History** – Review the historical log for events, such as when the form was added to the system and when it was last revised.
-  **Scoring Scheme** – Edit or develop a scoring scheme for the form template to “grade” job seekers by their answers.
-  **Settings** – Return to administrative **Settings** for the form template.

**Example:** To replace the “General Prescreener” above, choose the form’s  **Delete** icon from the *toolbar*. Then, drag another **Prescreener**, such as “Management Eligibility,” and drop it under: **External / Prescreener**.

**Notes:** *Permission to access tools for updating the form template may vary, based on your role. It is recommended that any editing to the form take place at this time. Editing may be disabled after the Approval Process is complete or when at least one job seeker applies.*

Press the **Next Step** button to review and set up **Sources**, or the on-line sites where the job announcement will be posted.

---

## 6. Select Sources: Job Boards and Social Media

### About Adding Sources to a Requisition


At this point in the requisition-building process, **Sources** are selected and associated with the new requisition. Through these outlets, job seekers will find out about the job opening and initiate the application process.

Several job boards are integrated with **balanceTRAK**, both free and fee-based Websites. For job boards that are not integrated with the software – and for social media sites – the system offers tools for pushing your Job Posting to those outlets after the requisition exists in the system.

### Add a Source to a Requisition

The screen will be organized into two tables:

- Manual
- Integrated (Will be automatically posted on line when the Requisition is Open and Posted Externally)

**Administrators:** A list of currently integrated job boards is maintained in on-line  **Help** at: System Tools > Client Settings.

Click the appropriate **Add** button to prompt a menu of available Sources. Then, ☒ check off one or more sources. Optionally, for each selected source, enter a: Cost. To complete the operation, press the applicable **Add Sites** or **Add Job Boards** button.

When **Sources** are in place, proceed to **Keywords** by clicking the **Next Step** button.

---

## 7. Develop Keywords to Score Resumés

An optional step in building a new requisition is to develop **Keywords** as a framework that helps you rank and filter job seekers. The system can scan job seeker resumés and calculate a Keyword Match Score in percentage. The keywords will also be highlighted in each resumé.

Furthermore, to better hone in on qualified candidates — or change what you are looking for as applications come in — **Keywords** can added or deleted at any time, by accessing the Requisition detail. See: [Edit Keywords and Check Matches](#).

### Keyword Requirements

A requisition can have up to 10 separate keywords, and a keyword must have from 2-to-50 characters, including spaces. Therefore, a phrase can function as a keyword.

### Add a Keyword

First, enter this task area by clicking **Next Step** on the **Forms** screen or choosing **Keywords** in the *side navigation menu*. Then, simply enter a term in the provided field, and click the **Add New Keyword** icon. Each saved keyword will display below the field, in a *title bar*.

### Delete a Keyword

To remove a keyword, click the  **Delete** icon in the Keyword's *title bar*.

Once **Keywords** are established, move on to **Workflow** settings, by clicking the **Next** button.

---

## 8. Set Workflow and Posting Dates

*Please note that in some software implementations, these settings may be locked.*

With these final requisition building blocks — **Workflow** and **Posting Dates**, respectively — you can:

- Set an optional job seeker threshold that will trigger the Requisition to stop accepting applications
- Determine the timing for posting of the job opening

### A. Workflow – Cap the Number of Job Seekers

In the **Workflow** task area, complete the Job Seeker Limits menu:

☒ Check the box to turn this feature on, next to the tagline: Stop accepting new candidates when [XX] people have applied. Then, using the provided ▲▼ **Up/Down** arrows for the numeric field, enter a maximum number of job seekers allowed.

Click the **Next Step** button to move on to the **Posting Dates** menu.



## B. Determine Job Posting Dates

Settings under **Job Posting Dates** control the timing and length of the "live" on-line posting period for the requisition, depending on your organization's software Implementation.

There are two basics automation options:

- Enter the desired **Start Date** and **End Date**, taking advantage of the provided calendar menus; or type in a date, using the two-digit-month, two-digit-date, and four-digit-year format.

OR

- If an [Approval Process](#) is in place — or alternatively, the job should post when the requisition category is Open — check the box, next to the tagline: ☒ Date Range automatically set to Approval Date or Date Opened.

Finally, choose a numeric entry, representing the posting period in the second tagline: Post for a total of [XX] days. Again, scroll with the provided ▲▼ Up/Down arrows to choose a number (e.g., 14 days).


Click the **Next Step** button to move on to the **Summary**.

### **Definition:**

■ **Category** chronicles the lifecycle, or status, of a requisition. In **balanceTRAK**, there are three categories comprising the lifespan of a requisition as it progresses:

- Pending
- Open
- Closed

## 9. Review Summary and Save the Requisition

As the concluding step in the  *Add New Requisition* process, a **Summary** screen provides the opportunity to finalize information and settings before adding a new requisition to the system.

On the **Summary** tab, each step you have previously addressed is represented by a *title bar*, starting at the top of the screen with **Details**. For each step:

1. ► Expand the *title bar*, and if applicable, review the provided information.
2. As needed, choose the **Go to ...** button to review the appropriate information and if necessary, return to the prior step.
3. When the **Summary** review is complete, press the **Create Requisition** button, located at the bottom of the screen.

Upon saving, the new requisition will be added at the top of the Requisition list, in one of two Categories:


Pending –

- For organizations with approval processes, if awaiting approval
- The posting start date has not been reached.

Open –

- No approval process is in place
- The posting start date has been reached.

## ORGANIZE THE REQUISITION LIST

Whether you arrive in the  **Requisitions** module after creating a requisition or come in from the *side navigation menu*, the *list column* will be useful for taking stock of the current requisition workload and status. With the *list column*, you can:

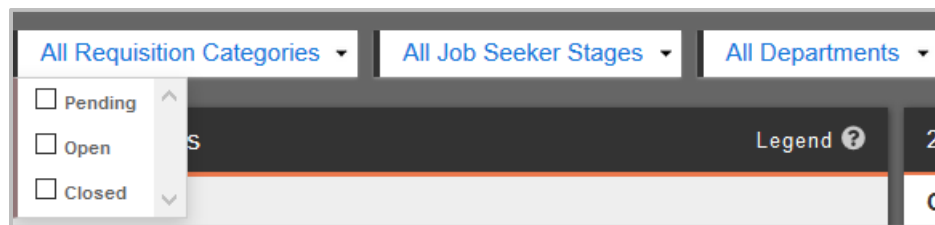
- **View requisitions** to understand current job openings and needs
- **Apply searches, sorts, and filters** to hone in on particular information within the “big picture,” such as all open requisitions with hires

AND

- As described earlier, **add a new requisition** to begin the recruiting process for the next job opening


### Drop-down Filters and Filter Definitions

While working with the *list column*, you can filter the list of existing requisitions by: Categories, Job Seeker Stages, and/or Departments, using the *upper drop-down menu*. This will narrow the display to the selected parameters.



Quick filters to trim down the number of requisition entries are available in three drop-downs, located about the *list column*. As shown above, the default menu position is to show: All ... .

As shown above, the first one on the left filters requisitions by Requisition Categories. The Categories, indicating [requisition status](#), are:

- **Pending** — The requisition has been added to the system, but remains in development. If applicable, the requisition is undergoing an Approval Process or the posting start date has not been reached.
- **Open** — The requisition is active. If applicable, approvals are complete. While Open, the requisition is posted on line and accepting job seekers.
- **Closed** — The requisition has resulted in a hire\* or has been administratively closed. (\*This closed requisition listing will show a  **Filled** icon.)

The second drop-down, when ▼ expanded, shows options for Job Seeker Stages, while the third allows you to select from Locations, Departments, or other organizational units that are in place for your organization.

Some typical Job Seeker Stages include:

- Application Received
- Application/Resumé Review
- Interview
- Offer
- Hired


Clearing the filter(s) is dependent on the drop-down:

- **Requisition Categories** — Uncheck the selection(s).
- **Job Seeker Stages** — Click the None link at the top of the menu.
- **Locations, Departments,** or other units — Select the top option: All [Units]

### Sort the Requisition List

The default sort for the list is descending order by Requisition Number, so that the requisition with the most recent number is at the top.

To change this sequence, click on the *column header*: Requisition. As you click through the sort options, the arrows will display for up and then, down. When the default sort is in place no arrows display.

You can also click on the other *column headers* to sort by: Job Title,  (# of Job Seekers), and/or Category.

**For more statistical information on Job Seekers:** *Each Requisition will have a **Summary** tab, featuring a table of Job Seeker statistics for that Requisition, as described [further along in this guide](#).*

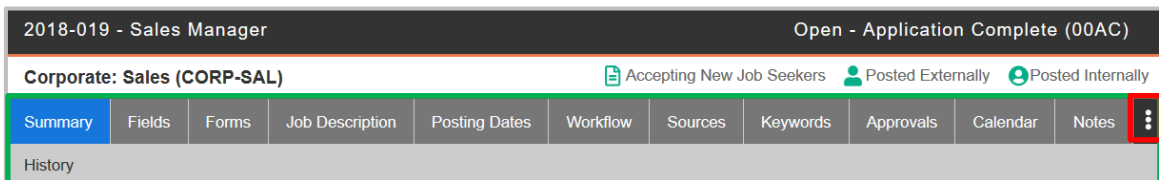
## THE REQUISITION DETAIL

With **balanceTRAK's** dual-window view, navigation between requisition detail views is accomplished with one click on the desired entry in the left-side *list column*.

This detail *window*, on the right side of the screen, is the essential workspace for reviewing requisition information and handling tasks associated with the job opening. Below are just some of the actions you can take:

- **Edit requisition information**, such as adding a resume keyword or closing one
- **Initiate approval(s) for a new requisition** and monitor responses
- **Manage sources** and **post a job opening** on line
- **View job seekers who applied**
- **Schedule interviews** and **communicate with job seekers**

### Navigate the Requisition Detail Title Bar



From top to bottom:

Requisition Number

Organizational Unit

Tab access header

From top to bottom:

Category


Toggle icons

Expand tab header

At the top of the requisition detail *window*, a *title bar* labels the requisition by Requisition Number, followed below by a label for the organizational unit (on the left).

Each requisition is also anchored by requisition identifying information and icons, located above the *tab header (to the right)*. The status Category indicates the furthest stage a job seeker for the requisition has reached.

## Full List of Requisition Detail Tabs

The Requisition detail's tabs mirror those found in the  **Add New Requisition** wizard, allowing you to review and update information entered when the Requisition was created, as well as develop new information as requisition tasks are completed:




- Summary
- Fields
- Forms
- Job Description
- Posting Dates
- Workflow
- Sources
- Keywords
- Approvals
- Calendar
- Notes
- History

If the screen cannot display all of the tabs within its width, the **Ellipses** icon, on the right of the *tab header* (outlined in the screenshot above), offers access to the hidden tabs.

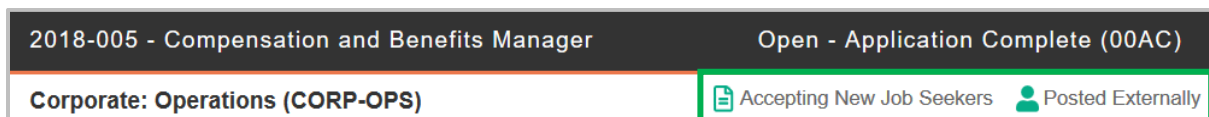
**Quick Tip:** Collapse the side navigation menu to enlarge the workspace.

## Toggle Icons to Accept Job Seekers/Post Job (and vice versa)

When a requisition is Open, up to three icons in the *tab header*, to the right, can be clicked to activate or deactivate the following actions:

-  Accepting New Job Seekers
-  Posting Externally
-  Posting Internally (optional)

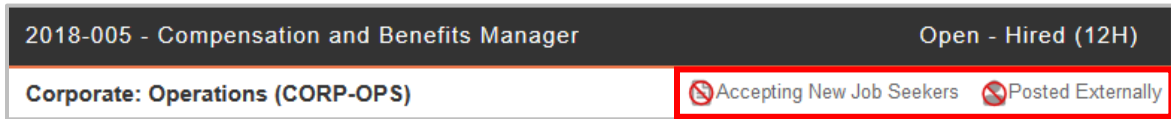
**Important Note:** When a Requisition is Open (as described below), the icons automatically activate, displaying in green, as shown in the following screenshot:



**Quick Tip:** These settings may also be initiated automatically by the system for the Open requisition and then edited by the requisition owner.

### Turn off the External Job Posting

For an Open Requisition with a hire, the icons can be clicked to deactivate the two actions. The icons are then shown with a cross-through:



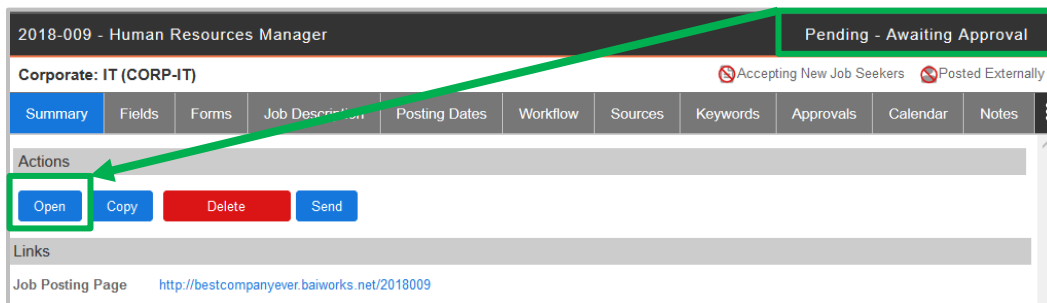
For a Pending requisition (shown in the next section), the icons will also be inactive.

### Perform Requisition Activities on the Summary Tab

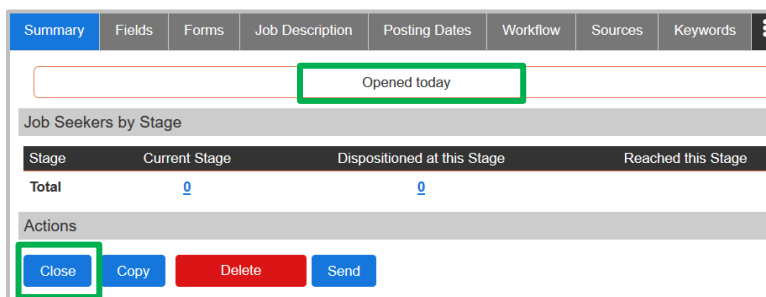
#### Summary

The first tab in the requisition detail, the **Summary** screen displays a *toolbar*, with buttons for performing requisition actions, including the **Open/Close/Reopen** button at the first position, controlling requisition Category (shown below). This button moves the requisition through its lifecycle.

In a Pending requisition – that is, awaiting approval or the live date – the **Open** button will display:



Meanwhile, in an Open Requisition, the first *toolbar* button indicates the next available status Category: **Close**.



### Change the Requisition Category

Where permitted by user permissions, click the button to advance the Category forward in the requisition lifecycle.


**Quick Tip:** Your software Implementation may automatically move a Pending requisition to Open, based on [Approvals](#).

### (Administrators) Copy or Delete the Requisition

The **Copy** and **Delete** buttons are the next items in the *toolbar*, for Administrator use only.

### Send the Requisition to Others

The last *toolbar* button on the right enables you to send a link for the requisition to one or more other users. Choose the **Send** button, and then, follow these steps:

1. If your organization uses Email Templates, select one from the drop-down.  
This will populate the message Subject and body. Per step 5 below, this information can be reviewed and edited.
2. (Optional) Check the box for: ☒ BCC me.
3. (Optional) Add any Attachments, in formats such as PDF, DOCX, or PNG and up to 5 megabytes in size.
4. For each **balanceTRAK** user, enter the first few letters of the email address OR first or last name.
5. (Required) Enter the Subject Line; then, compose the message body, using the text field and formatting toolbar.
6. (Optional) Click the  **Preview** icon (at the top of the tab) to review the email.
7. When the email message is satisfactory, press the **Send Email** button.



## Review Job Seeker Activity

### Summary

Open for 30 days (from 6/22/2018 to 7/22/2018)			
Job Seekers by Stage			
Stage	Current Stage	Dispositioned at this Stage	Reached this Stage
Application Complete	<a href="#">0</a>	<a href="#">13</a>	26
Reviewed by Manager	<a href="#">10</a>	<a href="#">3</a>	13
Selected for Interview 1	<a href="#">3</a>	<a href="#">4</a>	7

As a nexus to job seekers and their activities, the Summary tab organizes relevant statistics into the Job Seekers by Stage table (shown above). By clicking one of the available [links](#), you can jump to a filtered Job Seeker list by requisition and Job Seeker Stage. The Summary tab also includes a [link your organization's live Job Posting page](#).

### Visit Job Posting Links

At the bottom of the **Summary** tab, the Web site(s) for your company's Job Posting page will be available to view the page or reference the address(es).

## Review Fields Information

### Summary

### Fields

The **Requisition** detail begins with basic information, displayed on the **Summary** and **Fields** tabs. While the **Summary** tab (above) provides key job seekers metrics, the **Fields** tab is where you review the information entered [when the requisition was created](#).

**Quick Tip:** Once job seekers have applied to the requisition, you can click the [entry](#) under: # of Job Seekers (outlined above). The Job Seeker list will then display those applicants.

### Edit Requisition Information

Certain fields in this Requisition Information table can be edited by clicking the **Edit** icon, located in the upper right-hand corner of the *menu header*. An Edit Requisition window will appear, as shown below:


## Manage Forms

Summary	Fields	Forms
---------	--------	-------

**Important Alert:** To protect their integrity, editing of forms may be disabled. This may occur due to a requisition action (e.g., the approval process is complete; a job seeker has applied), or because a particular user lacks permission to do so. Where editing is allowed, the requisition **History** will record the occurrence (as described below).






Typically, the forms associated with a requisition will remain the same for the duration of the job posting. This ensures that job seekers who apply answer the same inquiries from your company about experience and qualifications. In the requisition detail, the **Forms** tab will hold the forms added while the requisition was being created.

### View Forms and Perform Form Actions


Just like how they were displayed in the  **Add New Requisition** wizard, forms are organized in the detail by the following *columns*, from left to right:

- **Form Templates** — The source library of available forms
- **External** — Form(s) currently associated with the requisition's external posting
- **Internal** — Form(s) currently associated with the internal posting

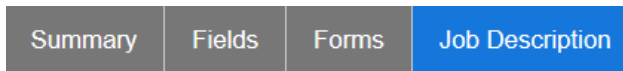
To access each form's *toolbar*, click the ► **Expand** icon, located within each form's *title bar*. Based on each user's permissions, the *toolbar* will contain the following icons for working with a particular form:

-  **View** — View a PDF of the form (and print, if needed)
-  **Edit** — Modify an existing form, and make form changes
-  **Delete** — Remove a form
-  **History** — Follow a quick link to the form's template's editing history
-  **Settings** — Follow a quick link to the underlying form template's settings

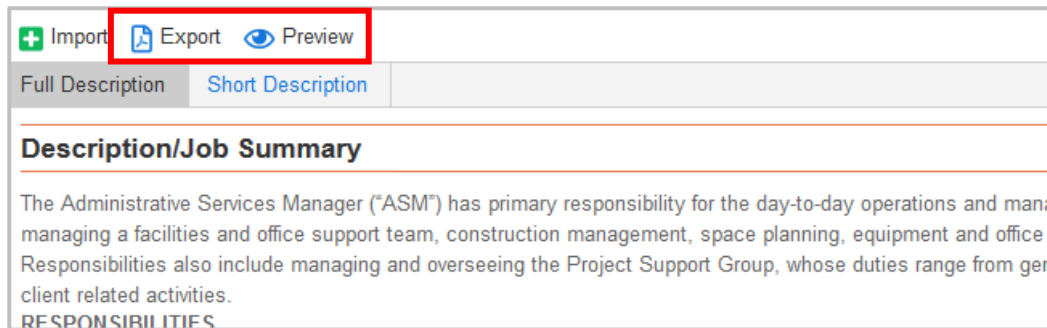
### Add a New Form to a Requisition

First, access the **Forms** tab. Again, in the same manner that a Form is added during the  **Add New Requisition** process, drag a Form from the Form Templates *column* on the left to one of the External or Internal *columns* on the right.


## Export, Preview, Edit the Job Description




Within the Requisition detail, several functions are available on the **Job Description** tab to export, view, and edit the job description. The **Short Description** can also be exported, viewed, and edited in a similar fashion.




### Export a Job Description

Both the short and long versions can be exported for use outside of **balanceTRAK**. From the *header toolbar*, select the  **Export** icon. Then follow the browser's prompts to save or open the PDF file. The file can then be printed, if desired.

### Preview the Job Description

For the long or short version, select the  **Preview** icon from the *header toolbar*. The Job Description will display in a new window, as it appears to job seekers.

### Edit an Existing Job Description

The method for editing a job description is identical to the one available in the  *Add New Requisition* wizard. Simply type directly in the body of a Section to make changes, and use the pop-up *toolbar* to update any formatting. Remember to **Save** the changes, as described next.

### Select Save Options for the Job Description

After you click **Save**, the system will present options for storing the changes locally or for applying the updated job description more broadly.

Accordingly, select whether the changes should be saved to:

- **This requisition only** (As the default setting, changes will only be saved locally.)
- **This requisition and the default job description for [Job Code]** (In addition to being saved locally, the updated version will also be stored in the system as the Job Code default for new requisitions.)

OR

- **This requisition, the default job description and all open or pending requisitions that use this Job Code** (In addition to being saved locally and as the Job Code default, the updated job description will be applied to the Job Code's current requisitions.)


**Note:** For content that is displayed on an external job board, there may be a time delay before updates appear. Please consult the on-line hosting provider for more information.

### Revert the Long Job Description to Job Code Default

(When a default is available) To remove any edits made to the current Job Description and restore it to the Job Code's default, click the **Revert to Default** button, located in the *tab header*.

### Import a Job Description (Administrative permissions only)

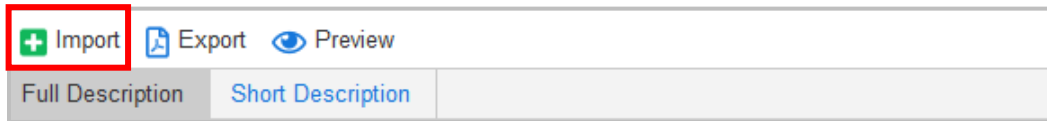
For those occasions when a job description must be imported into an existing requisition – for instance, to update obsolete content – the **balanceTRAK** user with appropriate permissions can do so.

Instructions for importing one or more job descriptions into the system library are available in on-line  **Help** at: Settings > *Special Settings by Table*.

Prior to performing the import, set up an appropriate Word template or document, as follows:

- The Word file should use section headers that identify each section.
- Consistent formatting with bold, italic, or font size should distinguish section headers from plain body copy.

Then, enter (or revisit) **balanceTRAK** to perform the import:



1. From the **Job Description** tab *toolbar*, selecting the **+ Import** button.
2. Browse for the document on your computer or network. Then, click the **Next** button.
3. On the Identify Section Headers menu, make selections that align the system's permissible sections with those in the document.\*
  - a. Begin with the bTrak Sections *column*. ☒ Check the box for each system section to include.
  - b. For each included section, choose matches from the corresponding Section Header and Next Section Header drop-downs to represent segments of the document.
4. Click the **Import** button.
5. After import, scroll through each Section on the **Job Description** tab to ensure the information was brought in as expected. Make an edits that are necessary.
6. Press the **Cascade Options** button to display the available save options. Follow the instructions above to: *Select Save Options for the Job Description*.

Complete the operation by pressing the **Save** button.

**\*Quick Tip:** To help the system hone in on your document's sections, scroll down the screen to the Filters menu. ☒ Check the box for the menu option that describes how the section headers are formatted:

- Section headers are bold.
- Section headers are italicized.
- Section headers are font size (and enter a value).


Finally, click **Apply Filter**, and return to the top of the screen.

## Manage and Track Sources

Summary	Fields	Forms	Job Description	Posting Dates	Workflow	Sources
---------	--------	-------	-----------------	---------------	----------	---------

Using the **Sources** tab, you can finalize settings for **balanceTRAK's** Integrated Sources and push a posting to a Manual Source, or non-integrated site (e.g., local job board) or social media (including Facebook, Twitter, and LinkedIn).

In addition, by tracking sources here, you will learn how candidates are finding your job postings so you can determine where best to expend recruiting resources.











Take advantage of Dashboard widgets that display **Job Seekers by Source** on the  [Home page](#).

For posting to occur with Integrated Sources, the requisition must have all required content (e.g., Application form, Job Description); the Posting Start Date must be reached; and the requisition must indicate the Status of accepting applications.


**Note:** A separate agreement and fee may be required by the third-party job posting provider.



(Integrated Sources, where applicable) ▼ **Expand** the down arrow to show source-specific settings for the external job board. (Menu options will vary by job board.)

### Track and Complete Information for Sources

Integrated Sources						
	Source	Cost	Tracking Code	Autopost	Link	Date Sent
 	CareerBuilder	890	CB			1/11/2019 0 ▶
 	Dice	570	DICE	<input checked="" type="checkbox"/>		1/11/2019 0
 	US jobs	0	USJ	<input checked="" type="checkbox"/>		1/11/2019 0
 <a href="#">Add Integrated Sources</a>						

Once one or more sources have been added to the Manual Sources table or the Integrated Sources table, the table view will remain expanded. Navigate to the following columns to review key tracking information:

- **Cost** — Update the current cost, as necessary.
- **Autopost** (For some Integrated Sources) — The system has automatically posted each source displaying a ☒ **Check mark**, based on [requisition settings](#).
- **Link** — Click the **Control +**  **Link** icon to view the associated Web page.
- **Date Sent** — This *column* confirms the date the job posting went live for each source.

-  (Job Seekers) — See which Sources are most effective by viewing the **Number of Job Seekers** statistic in this *column*.
-  (Expand) — Specific to paid job boards, expand the entry, and make additional selections as required by the job board, or take action to post the ad.

These tables can be edited in similar fashion to [step 6 \(Select Sources\)](#) of the **+ Add New Requisition** process.



**Quick Tip:** BalanceTRAK can [send you a reminder](#) to post a job to a manual source or send to social media sites.

### Complete Menus Specific to the External Job Board

► **Expand** the job board entry on the appropriate Sources table.

**Example:** Below is a sample menu for an external job board, CareerBuilder.

Integrated Sources

Source	Cost	Tracking Code	Autopost	Link	Date Sent	
 CareerBuilder	890.00	CB			4/22/2019	0

Job Type Codes (up to 3 codes)

☒ Accounting  
☒ Admin - Clerical  
☒ Automotive  
☐ Banking  
☐ Biotech  
☐ Business Development  
☐ Business Opportunity  
☐ Construction  
☐ Consultant  
☐ Customer Service  
☐ Design

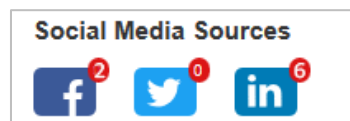
☐ Distribution - Shipping  
☐ Education  
☐ Engineering  
☐ Entry Level  
☐ Executive  
☐ Facilities  
☐ Finance  
☐ Franchise  
☐ General Business  
☐ General Labor  
☐ Government

☐ Government - Federal  
☐ Grocery  
☐ Health Care  
☐ Hospitality - Hotel  
☐ Human Resources  
☐ Information Technology  
☐ Installation - Maint - Repair  
☐ Insurance  
☐ Inventory  
☐ Legal  
☐ Legal Admin

Post Job

Each job board will have a specific menu (e.g., Indeed Apply will have a menu to place or sponsor a job posting; Monster will have a menu to select job families.)

### Monitor Social Media Effectiveness



Once the posting is live, check back on the **Sources** tab to review counts for job seekers coming in, by social media site.

## Edit Keywords and Check Matches

Summary	Fields	Forms	Job Description	Posting Dates	Workflow	Sources	Keywords
---------	--------	-------	-----------------	---------------	----------	---------	----------


Whether the requisition is new or existing, resumé **Keywords** can be fine-tuned at any time to help you better hone in on qualified candidates.



Currently saved keywords are each represented by a *bar*, displaying a statistic, representing the percentage frequency of matches for that word or phrase, based on the resumé of all job seekers who applied to the requisition. Based on low results, perhaps the keyword in place does not adequately reflect qualified candidates, or the applicant pool does not reflect the job's requirements. In the opposite, a high match percentage indicates the keyword is a good indicator of a common qualification. These inputs can be used to further guide your recruiting strategies.

**Quick Tip:** This resumé scan also produces the job seeker [Keyword Match Score](#), viewable on the Job Seeker list.

### Add a New Keyword

In the **Add New Keyword** field, located below the **Keywords** header, enter a term or phrase. Then click the  **Save** icon, which is located to the right of the field.

When the set of existing keywords is updated, the system will rerun the percentage calculation.

**Reminder:** A keyword can be deleted by clicking the  **Delete** icon, located within its *bar* (as depicted above).

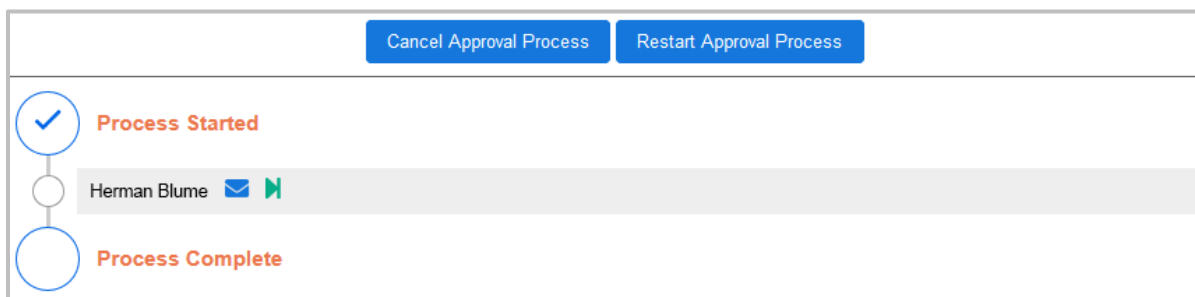


## Monitor Requisition Approvals


### Approvals

Because the [Approval Process](#) is typically designed when the requisition was created, the **Approvals** tab will be the place you visit in a **Pending** requisition to “follow-up” on the status of a current approval process. As a submitter, not only can you review Approval progress on a timeline, you can also remind an approver of an overdue response; skip one; and resubmit an approval request in the event of a non-approval decision.


Upon receipt of all the necessary approvals – and arrival of the Job Posting Start Date – the requisition will be moved along to: **Open**.



### Send an Approval Reminder

For any approver who has not responded to an approval request – including one who has **Timed Out** (based on your software Implementation) – click the  **Reminder** icon next to the approver’s name to send him or her another message.

### Skip an Approver (Administrative permission required)

This feature is particularly beneficial for organization’s having more complex approval processes, involving several decision-makers or approval groups. Simply click the  **Skip** icon to the right of an approver who has not yet responded to move the approval process along to the next approver. If there is only one approver, the approval process will be concluded.

### Resubmit Requisition for Approval

If a requisition has been changed — perhaps in response to disapproval — it can be resubmitted for approval. Clicking the **Resubmit** button in the *upper toolbar* will initiate the same Approval Process as was previously defined.

### Cancel the Approval Process

In the event a requisition will no longer need to be approved, the **Cancel** button can be used to abort the approval process.

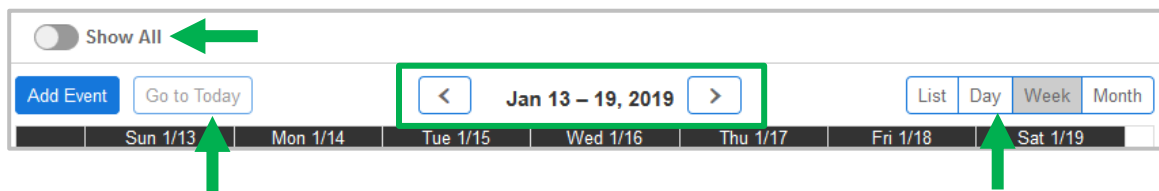
## Schedule Events with the Calendar



The **Calendar** tab in the Requisition detail can be used to schedule and track events associated with the requisition. Scheduled events will also show in the **Calendar** tile on the **Home** page **Dashboard**.

**Quick Tip:** If the **Calendar** tab is not visible in the *header*, **Expand** the *header*.

### About Calendar Navigation Tools



Starting in the screenshot above, from the upper left, the following tools support the display:

- Show All** – This toggle switch changes the default view – your events – to one including all events available under your user permissions.
- Go to Today** – If you are visiting a day in the past or future, quickly return to today's view.
- Scroll bars** – Navigate to the next available day, week, or month, depending on the existing view, using the provided navigational arrows.
- View options** – Located on the far right, this set of buttons can be selected to organize the view, by **List**, **Day**, **Week** (default), and **Month**.

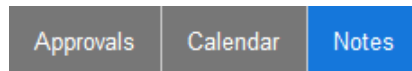
### Add a Calendar Event

Since the software's Calendar is compatible with Outlook, the event will be sent to those external email accounts of the event participants you select. The participants can then add the event to their Outlook Calendars, via an .ICS file.

1. Click the **Add Event** button, located in the *upper toolbar*.
2. Search for and select one or more attendees. (Your name will display automatically.)
3. Move down to set the event by date and time.
  - a. Select the Start and End Date, using the provided calendar. The dates can also be entered in a two-digit month/two-digit day/four-digit-year format.
  - b. Indicate the start and end times, using the provided drop-downs.
4. (Optional) Enter a Description and a Location.

Click the **Save** button.

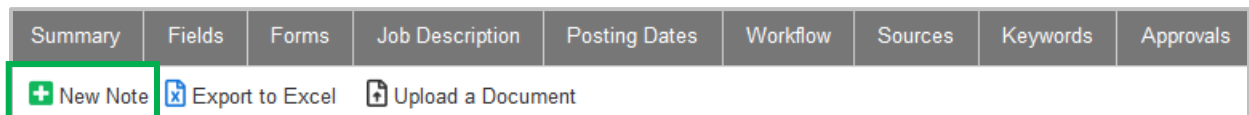
## Record Notes (and Tasks for the To-Do List)



Access the **Notes** tab in the Requisition detail to store unique information pertaining to the job posting or the hiring process. For instance, requisition notes are designed to help you compose reminders in the requisition about tasks or follow-up activities you would like to complete.

Each note entry is identified by creator name, created date, and when due, if applicable. And a note can be sent – as a task on the [To-Do List](#) – to the **Home** page **Dashboard**.

Keep in mind that while **Notes** are visible to all users with permission to view the requisition, tasks on the **To-Do List** remain personal, based on your user credentials.)



### Add a Note

You can add a note to the requisition detail by clicking the **Add New** icon:

1. A window will open, providing a text box to enter the annotation.
2. If desired, toggle the **Add to my To-Do List** switch to the active position, which converts the Note to a Task. Then, insert a Due Date, using a two-digit month, two-digit day, and four-digit year.

Click the **Save** button, and the note will be saved to the tab.

	Due Date	Created On	Created By	Note
		1/25/2019 10:25:00 AM	user@berkshireassociates.com	This position was upgraded.

To the left of each record on the Notes table, icons are available to **Edit** or **Delete** an existing record. In **Edit** mode, the entry activates a different *toolbar* to the left of the note to (left to right):

- **Save**
- **Cancel (editing)**
- **Mark/Unmark as task**
- **Mark as Complete**

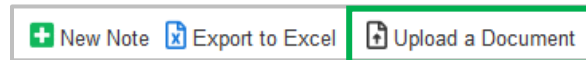


### Mark as a Task or Mark as Completed on the Notes Tab

In **Edit** mode, the Note entry displays a toggle icon, third from the left, that converts the entry between Note and Task, with a click of the mouse. Then, for a Task, the Due Date can be entered in two-digit month/two-digit year/four-digit year, and the entry saved. A Task is indicated with a **Checklist** icon.

Also in **Edit** mode, the Task can be marked as complete, by clicking the provided **Check mark**.

### Upload a Document to Notes



By clicking the *toolbar's* third button an external file can be added to the requisition record:

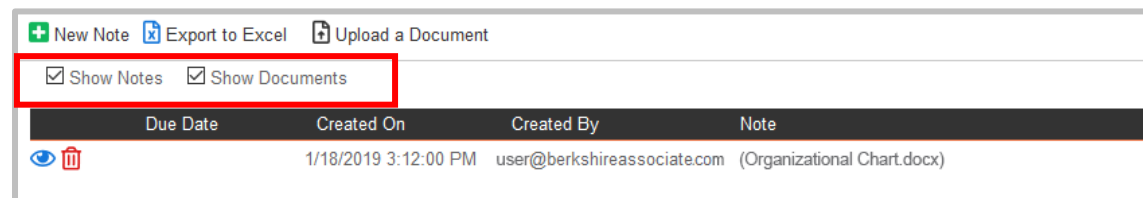
1. Click the **Upload a Document** icon.
2. Browse for the document on your computer or network.
3. (Optional) Enter a Description.

Press the **Upload** button.

The file will be added to **Notes**, labeled with the Create Date; the file name will be indicated in the Note *column*. When the table includes both data and document entries, the upper toolbar will expand, with check box options to:

- ☒ Show Notes
- ☒ Show Documents

Deselect one of the above options to limit the table to one entry type or the other.



To view the document, click the **Preview** icon, located to the left of the entry, and follow the prompts to download the document.

## Review Requisition History

Approvals	Calendar	Notes	History
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To maintain an electronic “paper trail” for the requisition, the **History** tab facilitates your organization’s efforts to track and audit system activities by automatically recording requisition actions, organized into two sub-tabs for **Requisition** and **Job Seeker**, respectively.

**Quick Tip:** A tab to review the job seeker’s history, specific to his or her activities across requisitions, is available in the Job Seeker detail; refer to: [Review Job Seeker History](#).


Each history record lists the date the action took place, the email address of the user who performed the action, and a description of the action. Actions include recording that:

- The new requisition was saved to the system
- An Approval Process was started
- A change was made to the requisition’s status Category
- An Acknowledgement email was sent to job seekers who applied

### View, Print, Export History

Just like for **Notes**, the requisition history can be exported for viewing, printing, and exporting in Excel, by clicking the  **Export to Excel** icon in the tab *header* (shown above).

## **MANAGE JOB SEEKERS**

In helping you screen applicants for jobs at your organization and manage their information, this chapter on the  **Job Seekers** module will show you how to review job seekers, read resumés, send emails, share candidate information with others, and assign applicant status.


Within the **Job Seekers** module, the list *column* (on the left side of the screen) supports you with the following key actions:

- **View job seekers** to get a “big picture” of the applicant pool
- **Filter the list** by requisition, requisition status Category, and/or applicant disposition
- **Display subsets of job seekers**, such as new, flagged, or internal
- **Perform actions** for multiple job seekers at one time – to send a form, disposition the candidate, or forward the job seeker, for just a few examples
- **View the individual job seeker** record


Within the **Job Seekers** module, the job seeker detail (in the right window) supports you with the following key tasks:

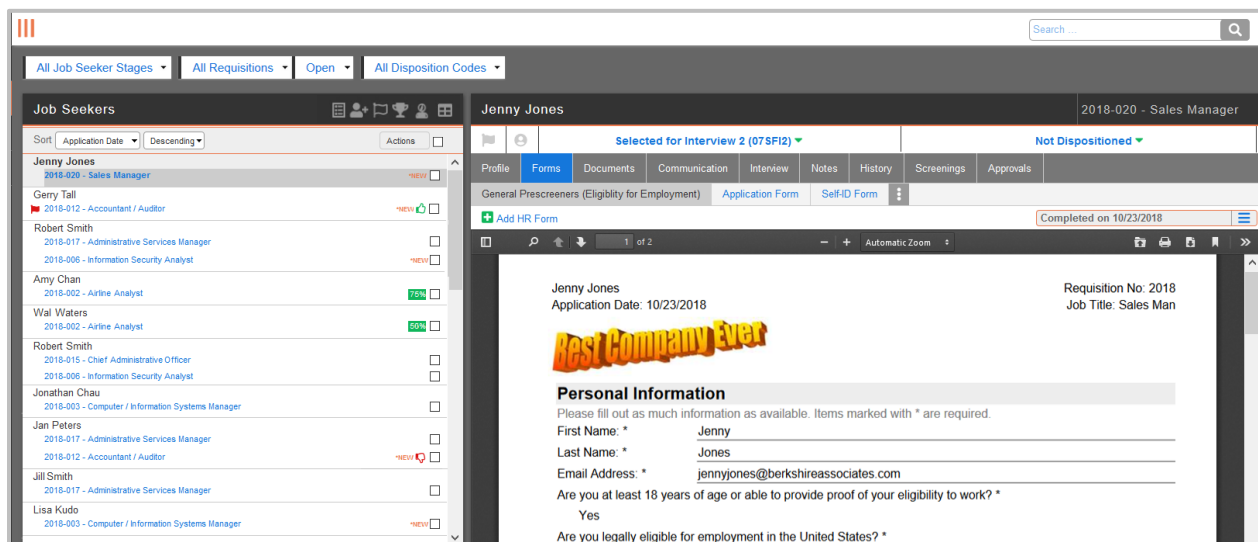
- **Work with a job seeker’s record** to assign a flag, update personal information, move the applicant along, or disposition the job seeker
- **Review job seeker submissions**, including completed forms and submitted documents
- **Identify keyword matches** on the job seeker’s resume to ascertain qualifications
- **Schedule an interview** with the job seeker
- **Communicate with a job seeker**, by email or text message
- **Share notes and history** about the job seeker
- **Submit the job seeker for a background check** or other external screening

## NAVIGATING JOB SEEKERS

In  **Job Seekers**, your navigation begins with the left-hand *column*, or the Job Seeker list. Here, the focus is on the applicant pool, so this column brings all job seekers together in one place.

Each job seeker, identified by name in the Job Seeker list, is associated with the following information:

- Any jobs applied to, identified by **requisition number and title**
- A Keyword Match Score (%), if applicable
- Where Assessments are installed, a **Pass/Fail** indicator
- If you have not viewed a job seeker yet, a “**New**” label (This label can be reapplied, using a [Job Seeker list action](#).)
- If one has been applied to highlight the record, a  **Flag** icon




The screenshot displays the 'Job Seekers' interface. On the left, a list of job seekers is shown with columns for name, application date, and status. The main panel shows the profile for Jenny Jones, who is 'Selected for interview 2 (07SF12)'. The profile includes tabs for Profile, Forms, Documents, Communication, Interview, Notes, History, Screenings, and Approvals. The 'Forms' tab is active, showing a 'General Prescreeners (Eligibility for Employment)' form. The form includes fields for First Name (Jenny), Last Name (Jones), and Email Address (jennyjones@berkshireassociates.com). It also has a section for 'Personal Information' with a 'Please fill out as much information as available. Items marked with \* are required.' note. The form is marked as 'Completed on 10/23/2018'.

## ORGANIZE THE JOB SEEKER LIST

When viewing job seekers, you can determine what information you want to see and in what order. The drop-down menus above the list column, along with filter icons and Sort options, will help you refine the full Job Seeker list to focus on key subsets.

### Sort and Filter Job Seekers

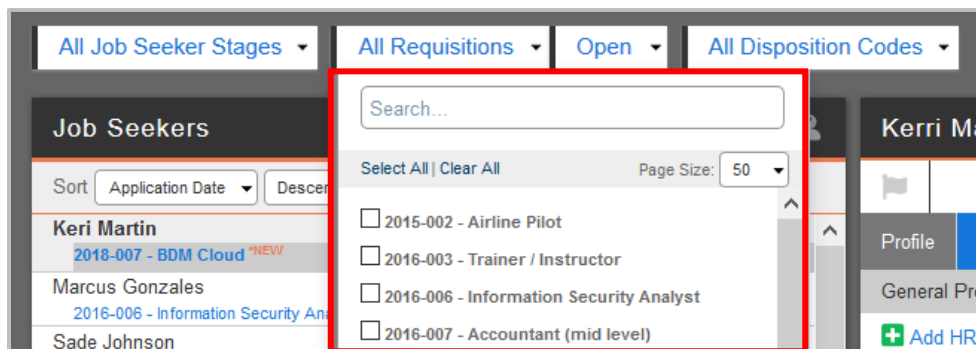
While working with  **Job Seekers** you can filter and sort those entries that will be viewable on screen, based on the fields you have included.

**Quick Tip:** [Advanced Searches](#) can also be set to customize the Job Seeker list display.

## Filter Job Seekers

A filter will reduce the Job Seeker list to only include records with specified values. Begin by ▼ expanding the four drop-downs, located above the list *column*, to understand the available filter values.

- Job Seeker Stages
- Requisitions (expanded in the screenshot below)
- Requisition Categories (Pending, Open, and/or Closed)
- Job Seeker Disposition Codes



From the expanded menu, choose the options that will create the desired display. To restore the full list, click the [Clear All](#) link(s), available at the top of the filter drop-down.

### Definitions:

■ **Job Seeker Stage** chronicles your organization's recruit-to-hire process, based on screening activities that winnow the field down until the best hire is made.

Examples include such activities as job seekers completing Application forms or accepting an offer. Other examples include the employer hosting interviews, initiating a background check, or extending an offer. A job seeker will advance from one Stage to the next, as long as the job seeker remains under consideration, or receives a positive outcome during the Stage.

■ Often linked to a particular Stage, **Disposition Code** documents why a job seeker was removed from consideration (or one of the fortunate few who get hired). Examples range from "did not meet minimum qualifications" and "applicant declined interview" to "hired."

Job seekers who remain in the screening process will retain a default code, denoting "not dispositioned." Top candidates who may be a "back-up" choice or a match for other open positions can be dispositioned as **Silver Medalist**. The hired candidate will also be dispositioned, but with a code indicating "hired."



### Filter by Icons

As a secondary filter, applied in combination with the drop-down filters above, or as a stand-alone option, consider how the list can be filtered by icons, located in the list *column header*.

From left to right, the icons filter by: (Show) Stage/Disposition, New, Flagged, Internal, Silver Medalist, Incomplete (if allowed by user permissions), and Grid View:



When one or more of these filters are applied, the icon will convert from grayed out to a bright version. Above, filters are applied for Internal and Silver Medalist. \*

\***Reminder:** Keep in mind that no job seekers may be available for the selected filter.

**Show Results by Grid View** – For data aficionados, the Grid View of the Job Seeker list offers a more traditional data table, allowing a complete display of job seeker data entries. Select a requisition from the All Requisitions drop-down filter to activate this icon.

### Sort Job Seekers

Two menus that control the order of the Job Seeker list are located at the top of the *column*, next to the Sort label.

1. ▼ **Expand** the first menu, and select one of the following content options to sort by: Application Date, Name, Requisition Number, Job Title, and Keyword Score.
2. In the second menu, set the sort order, either Descending (the default) OR Ascending.



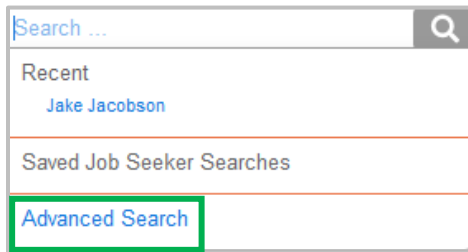
### View Incomplete Job Seekers (Administrative permission required)

In addition, users with appropriate system permissions can view job seekers in the **Incomplete** status, meaning the Application (or other form) has been started, but not completed. The following settings must be in place:

- A system user Profile must be in place, allowing you to view these job seekers.
- The Requisition must be: Accepting New Job Seekers.


Simply select the **Incomplete** icon from the *list column header*. The applicable job seekers will be added to the job seeker list, each marked with the **Incomplete** icon.

## PERFORM AN ADVANCED JOB SEEKER SEARCH



The **Advanced Search** allows you to find job seekers, by selecting (and combining) identifiers, data values, or keywords from the **balanceTRAK** database. With these options, you can also mine particular bodies of information, such as profile entries, answers to questions, requisitions, and resumé. Once defined, the advanced search can be saved in the Search menu for future application.

### Initiate the Job Seeker Search

You will find search options for job seekers by clicking your mouse to expand the  **Search** bar, and selecting the **Advanced Search** link (shown above) to display a comprehensive menu, organized by:

#### Search Options

- Eligibility Status
- Resume Keyword

#### Specialized Search Options

*Tabs for:*

- Personal Info(rmation)
- User Access Code (or other displayed requisition field, based on your Implementation)
- Questions
- Education
- Employment
- Geographic


**Quick Tip:** It may be beneficial to review each of the Specialized Search Options to understand the full extent of Search capabilities.

The screenshot shows a web interface for job seekers. At the top, a dark header bar contains the text 'Search Options' and a green box with the number '1'. Below this, there is a checkbox labeled 'Include Job Seekers that are not associated with a requisition'. To the left, under the heading 'Eligibility Status', there is a section 'Include Job Seekers That Are' with two radio button options: 'Eligible And Ineligible' (selected) and 'Eligible'. To the right, under the heading 'Resume Keywords', there is a text input field and a note: 'For a compound search, include AND or OR to connect a pair of Search descriptors. Enter parentheses to join two terms within a descriptor. Example: (sales or marketing) AND (supervisor or manager)'. A green box with the number '2' is placed next to the 'Eligibility Status' heading. Below the main content area, a dark header bar contains the text 'Specialized Search Options' and a green box with the number '3'. Under this header, there is a row of tabs: 'Personal Info', 'User Access Code', 'Questions', 'Education', 'Employment', and 'Geographic'. Below the tabs, there is a link '+ Add Personal Information Field'. At the bottom, there is a 'Save For Later' section with a text input field and a green box with the number '4'. Below this, there are two buttons: 'Apply Search' and 'Clear Search'.

## Make Selections, Save, and Apply Search

At any time after making one or more selections, click the **Apply Search** button, at the bottom of the screen, to begin the operation.

1. Begin by reviewing the initial Search Options, located at the upper right. For searches on a larger OR smaller job seeker group:
  - a. Check the box to: ☒ Include Job Seekers that are not associated with a requisition.  
OR  
Leave the box unchecked to retain the default setting.
  - b. Leave the default selection for Eligibility Status to include:
    - ☒ Eligible and Ineligible
    - OR
    - ☒ Click one of the two subsets.
2. If the resumé will serve as the conduit for your search, enter a term into the Resume Keywords field  
OR  
Skip this step.

3. Navigate down to the Specialized Search Options menu, and enter one of the sub-menus by clicking the appropriate tab.
  - a. For the Profile and Questions tabs:  
Click the  **Add ... Field** icon, and select a field from the provided drop-down. In the provided field, enter the search term. Repeat this operation as needed until all the desired terms are included.
  - b. For User Access Code (or displayed requisition field), Education, Employment, and Geographic:  
Complete the provided data entry field(s) in an as exacting manner as possible.
4. If the advanced search is likely to be useful in the future, enter a name in the field next to the tagline: Save for later.


Press the **Apply Filter** button.

**Example:** The Application asks, “Are you bilingual in Spanish and English?” And you want to locate all candidates who answered “Yes”. Under Specialized Search Options, access the Questions tab.

1. Type in the first few letters of the question to display a system prompt for the question.
2. Click the appropriate prompt, which will display the possible answers.
3. Check the box for “Yes”.

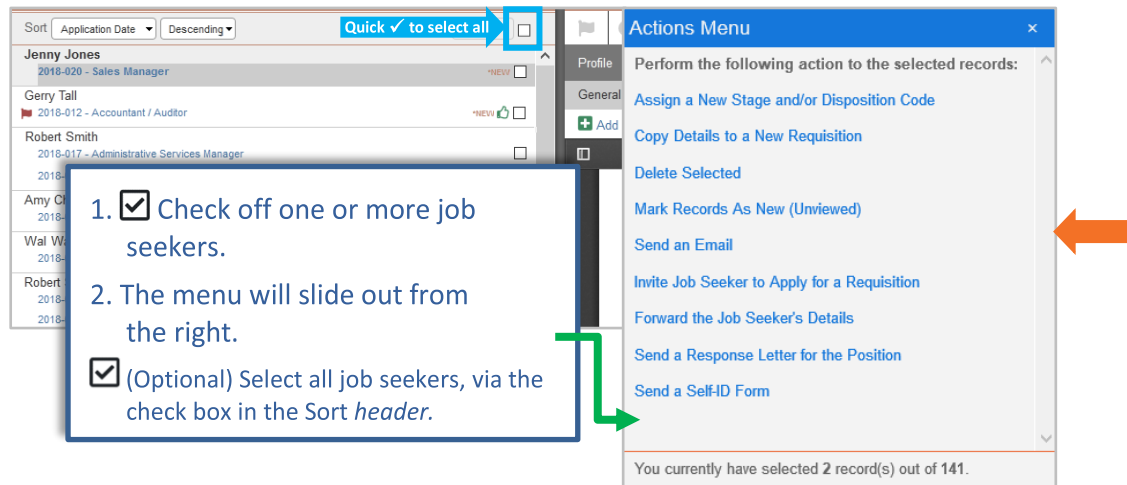
If your organization does not have this question, you could perform a resumé keyword search on the term “bilingual”.

### Show the Results for an Existing Advanced Search

1. Expand the  **Search** bar.
2. Select the view from the provided drop-down menu.

## PERFORM JOB SEEKER ACTIONS

Activated via a check box in the Sort *header*, Actions allow you to apply functions to multiple job seekers at one time, once one or more job seekers are selected. Key Actions are described below.



### Assign a New Stage and/or Disposition Code

The first Action is an option to assign Stage/Disposition Code from the job seeker list to one job seeker or a group of job seekers.

**Quick Tip:** This Action is an efficient way to disposition a quantity of job seekers who are no longer being considered for the job opening. In many cases, the job seeker will be reviewed and assigned a Stage and/or a Disposition on an individual basis. See the instructions for: [Assign Stage and Disposition in the Job Seeker Detail](#).


- ☒ After selecting the job seekers, which initiates the Actions menu, click the link to [Assign a New Stage and/or Disposition Code](#).
- The right-hand window will convert to a menu to assist you in identifying and applying the two status indicators to the selected job seekers:
  - Examine the current Job Seeker Stage and Disp Code settings for each job seeker, as shown in the table. Then, review each job seeker to ensure each one should be included in the Action.
  - If a job seeker has been included in error, simply click the **✕ Remove** icon next to the job seeker's name. (You can always click the **Cancel** button, at the bottom of the window, to exit without performing the Action.)


3. Return to the top of the window:
  - a. Choose a Job Seeker Stage from the uppermost drop-down menu.
  - AND/OR
  - b. Select a Disp Code from the next drop-down.
4. Finally, navigate to the bottom of the window, and click the **Assign** button.

**Caution:** The Administrator may have set the option for an email to be automatically sent to a job seeker, based on the assigned applicant status. If so, you may trigger an email to be sent without your knowledge. Check with your Administrator to see what email settings are in place.

### Copy Details to a New Requisition

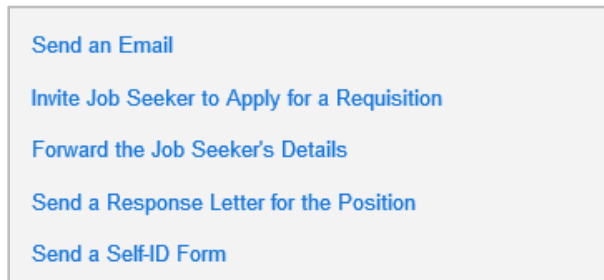
This Action allows you to copy one or more job seekers already in the database to a different requisition. This Action is particularly beneficial for “moving” dispositioned job seekers from a Closed requisition to another Open one that that better suits their qualifications.

**Quick Tip:** Filter the Job Seeker list by the  **Silver Medalist** icon to determine which candidates were “contenders” for other filled openings. This pool may offer candidates for hard-to-fill positions.

1. ☒ After checking off job seekers, click the Actions link for Copy Details to a New Requisition.
2. Navigate to the right-hand *window*:
  - a. Confirm the list of job seekers to copy. If necessary,  **Remove** any that are included in error.
  - b. Make selections for the forms to include, or leave the default settings for: No Forms.
  - c. (Optional) ☒ Check off whether to notify the job seeker(s) about being considered for a different position.
3. Click the **Copy Job Seeker** button to associate the job seekers to the selected requisition, or click **Cancel** to return to Job Seeker list.

## Actions to Send Email

The job seeker Actions menu displays several options for communicating by email with multiple applicants at one time from the Job Seeker list, such as sending an email, inviting job seekers to apply, and sending blank forms for completion. By taking another action, one or more job seekers can also be forwarded to colleagues for review.



In support of communication with job seekers, your organization's Administrator will manage a **balanceTRAK** library, comprised of approved **Email Templates**. These templates include:

- Approved language for the identifying subject line and message body
- Tags for automatic merge information (e.g., job seeker name, job title)
- A return link for the recipient to **balanceTRAK**, if further action is required.

In addition to selecting recipients, most users can edit the content and attach a file to the message.

**Administrators:** For more information on managing email communications and templates, see on-line **? Help** at: Settings > Email Templates, and System Tools > Email Settings.

### Send an Email



This bulk email option supports the many miscellaneous needs for communication you may have with a group of job seekers.

**Reminder:** To send a form to a job seeker for completion, select one of the "send form" methods, which are explained below.

1. First, ☒ click the check box next to one or more job seekers, and select Send an Email from the Action slide-out menu.

2. A composition area opens in the right-hand *window*. Begin by confirming recipients, choosing a template, and composing/formatting message content.

**Reminder:** Your organization's workflow may restrict users to selecting approved **Email Templates** only.


- a. Within the window, the left-hand *column* will confirm what job seekers have been selected. If any applicants are included by mistake, click the corresponding  **Remove** icon.
  - b. Go to the composition area, and begin by reviewing the available template options – ▼ **Expand** the drop-down, located next the tagline: Choose Email Template. Choose one, if applicable (or a message can be composed, via step d below).
  - c. Enter a BCC email in the provided field, if desired.
  - d. Edit the Subject line and content, as needed. Be careful when working near tags, which are identified by double brackets.
3. If additional merge information or links are necessary, click the mouse in the body at the appropriate location. Then, click the **Insert Tags** button, located in the *lower toolbar*. Select a tag from the left column, and click the **Close** button.
4. If needed, attach one or more documents to the message. Click the  **Attachment** icon, and **Browse** for the file on your computer or network.
5. Click the **Preview and Send** button.

When the content is satisfactory, click the **Send** button.

### Forward the Job Seeker's Details

The Action to Forward the Job Seeker's Details is handy for sending job seeker information, such as the resume or Application form, to other users or to external email addresses.

1. After selecting the relevant job seeker(s), choose Forward the Job Seeker's Details from the Action menu.
2. A Forward Job Seeker window opens in the right-hand *window*, with the selected job seekers confirmed in the left *column*. Review this list.

**Reminder:** You can  **Remove** a job seeker if one was included by mistake.



3. Move to the right and work in the composition area.
  - a. Start with the drop-down next to the tagline: Choose a Template; and choose: Send Job Seeker to Others.  
  
**Note:** As a starting point, the message will be populated with all necessary elements, including a return link to **balanceTRAK** for the job seeker, plus other tags that will personalize the content for each recipient.
  - b. Compile recipients in the fields for To and BCC, as necessary, by entering one or more balanceTRAK Users and/or external email addresses, separated by semi-colons.
4. Enter the message, work with tags, and add attachments as described above under "Send an Email" (above).
  - a. By default, the job seeker's resumé will be attached. To add other forms (and documents) from the system, make appropriate selections:
    - Prescreener
    - Application
    - Cover Letter
    - Other Forms
    - Additional Documents
5. Click **Preview and Send**. To edit the email, close the preview, make the necessary changes, and click **Preview and Send** again.
6. After reviewing the preview, click the **Send** button. A personalized email will be sent to each job seeker.

### Send a Response Letter for the Position

The Action to Send a Response Letter for the Position **automatically generates an email message** (from an approved Email Template) for job seekers assigned a Disposition code, such as those who have been dispositioned for not meeting the minimum qualifications.

#### ***Before you Begin:***

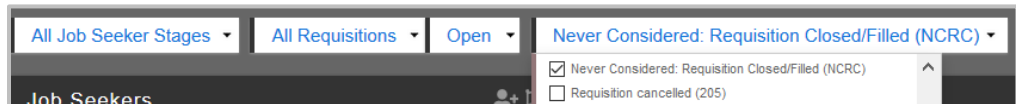
- The job seeker must have an assigned Disposition code.
- AND
- The assigned Disposition code must be associated with an existing email template.

**Quick Tip:** As an alternative solution, use the Send an Email Action to reach job seekers who are not dispositioned.

To prepare for and initiate the response letter:

1. Navigate to **Settings > Email Templates**, and locate the desired template. Because the response letter cannot be edited while preparing this Action, ensure the content is satisfactory.
2. Return to **Job Seekers**, and filter the Job Seeker list by the desired Disposition code, using the Filter drop-down menu.

**Example:** The code below designates job seekers who were never considered:



3. From the filtered Job Seeker list in the *left column*, ☒ check off one or more desired recipients, activating the Action drop-down.
4. From the Action drop-down, select the Send Response Letter link to immediately send the email.


### Send a Self-ID Form

This Action makes it possible to send the Self-ID to an individual applicant or a group of job seekers.

**Note:** A link to the form will be sent to the job seeker.

1. First, ☒ click the check box next to one or more job seekers, and select Send a Self-ID Form from the Action menu.
2. In the composition area, confirm the recipient(s) as displayed in the *left column*.
3. Move to the right, and choose a template, if one exists. If not, a link can be added, as described below.
4. Review and compose the Subject line and message body.
5. If a link for the form is needed, click your mouse at the insertion point in the message body.
  - a. Select the **Insert Tags** button from the *lower toolbar*.
  - b. In the left column, locate and select the appropriate tag for "Link to ...".
  - c. Press the **Close** button to return to the composition area.
6. **Preview and Send** or **Send** the email.

## VIEW THE JOB SEEKER DETAIL

As introduced earlier in this chapter, the detail window in  **Job Seekers** is always displayed, and a simple click on a job seeker name in the left-hand *list column* will take you to another applicant detail.





By navigating to tasks within the job seeker's detail window – and taking advantage of global header tools – you can:

- **Learn about each job seeker** and his/her qualifications
- **Interact with a job seeker** to schedule an interview or make a request
- **Advance a job seeker** in the screening process or disposition one
- **Review job seeker progress** and history
- **Perform recordkeeping** or database functions

### ***Full Inventory of Job Seeker Tabs***

Profile	Forms	Documents	Communication	Interview	Screenings	Approvals	Notes	History
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In the job seeker's detail window, a comprehensive header provides navigation between multiple tabs, representing critical screening or recordkeeping tasks:

- Profile
- Forms
- Documents
- Communication
- Interview
- Duplicates (Administrators only, see on-line  **Help**)
- Screenings (if installed)
- Approvals (if installed, see on-line  **Help**)
- Offers (not shown, see on-line  **Help**)
- Onboarding (third-party contract required, not shown, see on-line  **Help**)
- Notes
- History

The entry tab for a job seeker is typically **Documents**, landing on the resumé. If a resumé is not available, the system will land on **Forms** (as shown below), showing the job seeker's completed Application form.

## Get to Know Header Icons and Tools

The screenshot shows the header of the Job Seeker Detail page. At the top left, the name 'Jake Jacobson' is displayed. To the right, there is a green arrow pointing right and the text '2019-00002 - Receptionist'. Below this, there are two indicator icons: a flag icon and an internal candidate icon (a circle with an 'i'). To the right of these icons are two dropdown menus: 'Application Received (AR)' and 'Salary requested too high (112)'. Below these elements is a row of navigation tabs: 'Profile', 'Forms', 'Documents', 'Communication', 'Interview', 'Screenings', 'Approvals', 'Notes', and 'History'. The 'Forms' tab is currently selected. At the bottom of the header, there are two buttons: 'WM\_Internal Application' and 'Self-Id Form'.

Starting in the *header* at the top of the job seeker detail, global features include:

- A Requisition [link](#) for accessing the associated requisition, on the top right
- Two indicator icons, on the second row at the far left
- AND
- Side-by-side menus to log the job seeker's progress and disposition

### Flag a Job Seeker

On the far left of the detail header, the **Flag** icon, when clicked, will highlight the job seeker in the *list column*, so that the record can be quickly retrieved later.

### About the Internal Candidate Designation

Because an internal job seeker will come into the system via a Web page specifically designated for those applicants, the system will activate the **Internal** icon for each one. Conversely, this icon will be "grayed out" in the Job Seeker detail for an external applicant.

### Assign Stage and Disposition in the Job Seeker Detail

Earlier in this guide, the bulk [Action](#) to assign Stage/Disposition was introduced and [definitions for those terms](#) were provided. However, to support the consideration and tracking of applicants on an individual basis, tools to assign these tracking codes are prominently located in the Job Seeker detail.


To change either tracking code:


1. In the left box, the current Job Seeker Stage is displayed.
  - a. Click the **▼ Down** arrow to expand the menu and review other options.
  - b. Select a different Stage, which will then display in the *header*.
2. In the right-hand box, a label will prompt you to "Assign" a Disposition code or indicate the current one.
  - a. Click the displayed label to choose a code from the provided drop-down options.

## Review the Jobs Seeker's Profile

### Profile

The **Profile** tab pulls information together for the job seeker – including across requisitions if the applicant has applied to multiple openings – via the following sub-tabs:

- **Personal Information\***
- **Jobs Applied To**
- **Ineligibility\***
- **Security\***
- **Subscriptions** (Please refer to on-line  **Help**.)

**\*Administrators:** Users with administrative permissions can find more information on displaying sensitive information (e.g., race, gender), ineligibility, and security in on-line  **Help** at: Job Seeker Detail > Manage the Job Seeker Profile.

### Review and Update Personal Information

Within the **Profile** work area, the **Personal Information** sub-tab stores each job seeker's contact information for your review and if necessary, editing. The following key fields, pulled from the corresponding section of the Application form, are typically available, among others:

- First Name, Middle Name, Last Name; Other Names, Maiden Name
- Social Security Number
- Race Code, Gender Code
- Email Address, Phone, Phone Can Text
- Date of Birth
- Street Address, City, State, Zip Code, Country
- Driver License Number

If any of the information is updated, select the **Save Personal Information** button, located in the *lower toolbar*.

## Jobs Applied To

The **Job Applied To** tab offers a convenient – and cumulative – list of all the job openings to which the job seeker has applied. This table identifies each requisition and provides key details about the job seeker's progress or outcome for that job opening:

- [Requisition \(Number\)](#) – Links to the underlying Requisition detail.
- Application Date
- Job Seeker Stage
- Disposition
- % of (Resumé) Keywords Matched

## Review the Job Seeker's Submitted Forms

Jon Williamson

2018-00304 - Landscaper

Unassigned ▼ Not Dispositioned ▼

Profile Forms Documents Communication Interview Screenings Approvals Notes History

Application Self-Id Form

Add HR Form Completed on 10/23/2018

Jon Williamson  
Application Date: 10/23/2018  
Application

Requisition No: 2018-00304  
Job Title: Landscaper

**Personal Information**

Last Name: \* Williamson

Because forms request the same information from all job seekers who apply for an opening, the information these documents collect is integral to an employer making a thorough and equitable evaluation of those candidates.

**Quick Reminder:** If a job seeker applies to multiple positions at your organization, he or she may complete separate forms for each requisition. Make sure the proper requisition for the job seeker is being displayed.

With the **Forms** tab prominently located in the second position of the detail's tab header, you have detailed access to all the data your organization requested from the applicant. Of course, it all centers on the (required) Application form. That's why the landing page for **Forms** is the application.

Based on your organization's specific set-up, the Job Seeker may have completed (or will complete later in the process) other forms to accompany the Application, such as:

- Prescreener (typically precedes the Application)
- Self-Identification (for race, gender, disability, and Veteran status)
- [Background check](#)
- Assessment

For definitions of the above Form categories, see: [Form Types](#).

### How Forms are Organized

A sub-tab will display by Form type, according to your organization's terminology (e.g., Commercial Driver Application, Accounting Assessment). Each sub-tab, when active, will be largely comprised of a window, displaying the completed form.

When the submitted form has arrived but has not yet been viewed, the sub-tab will be marked as "New." Each sub-tab will also display a status bar at the upper right. However, most users will only see a form when it has been fully completed by the Job Seeker, as shown above.

### View a Form (in PDF)

The form represented by the first sub-tab to the left will display on entry. To show a different form, select the appropriate sub-tab from the **Forms** tab header.

### Navigate, Print, or Download Completed Forms

The form window is configured as a PDF viewer, with familiar header tools to:

- View Thumbnails (in the Sidebar)
- Search
- Zoom
- Navigate through pages
- Print
- Download

When the PDF is printed, the form will be identified with the job seeker's name, the requisition number, and the job title.

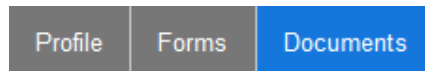
### Take Full Advantage of Form Responses via the Advanced Search

Job Seeker forms, across the applicant pool, hold a trove of information on job seekers, and likewise, **balanceTRAK** offers an array of advanced job seeker filter tools to help you dig into the data.

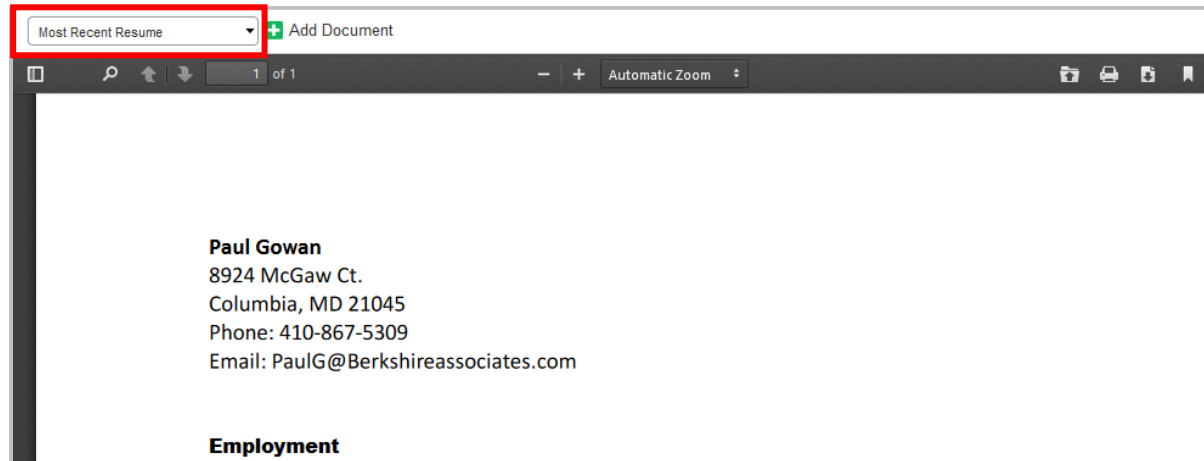
Whether you are looking to compare applicants having multiple prerequisites for an open position or you are looking for someone with one rare skill for a hard-to-fill job, an advanced Search lets you build, save, and reuse filters that help you compare a subset of job seekers.

For more information, refer to: [Perform an Advanced Job Seeker Search](#).

## Examine Submitted Documents



Documents that have been uploaded by the job seeker, including the Most Recent Resume (as shown below), will be housed on the **Documents** tab.



Access other documents, such as the Most Recent Cover Letter, by ▼ expanding the upper drop-down, and selecting one. As depicted above, the document window is capped with a viewer *toolbar*, having options to Search, Zoom, navigate, Download, and Print, among others. Documents uploaded by the job seeker cannot be deleted.


## Upload a Document

The **balanceTRAK** user can upload other Word, PDF, or text documents for inclusion in the job seeker's file as long as they are 5 megabytes in size or less. Simply select the **+ Add Document** icon from the *upper toolbar*.

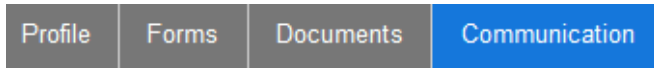
 A screenshot of the 'Add Document' form. The form has a title bar with a dropdown menu set to 'Most Recent Resume' and a green '+ Add Document' button. Below the title bar, there is a 'Document Type' dropdown menu set to 'Other Document'. A 'Description' text area contains the text 'Job Seeker's Portfolio of Work'. Below the description is a 'Browse...' button followed by the filename 'GowanCompiled.pdf'. At the bottom of the form are two buttons: a green 'Upload' button and a blue 'Cancel' button.

1. Select a Document Type from the provided drop-down, either Resumé, Cover Letter, OR Other.
2. Enter a Description, so the document can be identified and selected in the future.
3. **Browse** for the file on your computer or network.
4. Initiate the import by clicking the **Upload** button.




When selected for display, the user-uploaded document will be labeled with an upload date, appearing in the *upper toolbar*. Remove the user-uploaded document by selecting the  **Delete Current Document** icon from the *toolbar*.

## Communicate with a Job Seeker



In support of your organization's efforts to reach out to job seekers by email and text – and document telephone calls – the **Communication** tab for each job seeker offers interactive tools, recordkeeping support, and display filters.

**Quick Tip:** Monitor the email and text conversations with the job seeker, via the software header's  **Notification Center**.


### Navigate the Communication Workspace

 A screenshot of the 'Communication' workspace. At the top is a navigation bar with tabs: Profile, Forms, Documents, Communication (active), Interview, Screenings, Approvals, Notes, and a menu icon. Below the tabs is an 'upper toolbar' with icons for email, text, and voice. The main area is split into two panes. The left pane shows a list of communications, with one entry highlighted: 'ACME - Background Check Form' with a timestamp '1/17/2019 12:17 PM' and a 'new' status. The right pane is a composition window with fields for 'Template' (set to 'None'), 'To' (jessie.meyer@gmail.com), 'CC', 'BCC', and 'Subject'. There is also an 'Add Attachments' button at the bottom.

The work area is divided into a list *column* on the left, for tracking and viewing dispatched communications, plus a right-hand window, for composing (and documenting) the conversations. Once an email or a text message is sent, or a telephone call is saved, an entry is saved to the list *column* for reference.

### Send an Email Message to a Job Seeker




From the *upper toolbar*, choose the  **Add New Email** icon. Then proceed downward to complete the menus and fields, as displayed:

1. (Optional) Select a template from the provided drop-down (or leave the selection as: None).
2. Review the job seeker's email address, as populated in the To field.

3. (Optional) If applicable, CC and/or BCC other **balanceTRAK** users by typing a few letters of each name and selecting one from provided prompts. (To CC or BCC an external contact, enter the contact's email address.)
4. Enter a Subject for the message.


The screenshot shows an email composition window. At the top, there is a 'Template' dropdown menu set to 'None'. Below it are input fields for 'To' (jessie.mayer@gmail.com), 'CC', and 'BCC'. The 'Subject' field contains 'Follow up information'. Below the subject field, there is a red 'X' icon and the text 'Acme Benefits Brochure.pdf;'. Below this is a rich text editor toolbar with various icons for text formatting (bold, italic, underline, strikethrough, bulleted list, numbered list, indent, outdent, link, unlink, quote, unquote), alignment (left, center, right, justified), and other functions (undo, redo, source). The email body contains the text: 'Hello Mr. Mayer:' followed by 'Below, please see information on our company's benefits|'.

5. (Optional) To add a file to the message, click the  **Attachment** icon, and browse for the file on your computer.
6. Enter content in the message body, and format its appearance, using the Word-like formatting *toolbar*.

When the above items are complete, click the **Send** button at the bottom of the window.

### Document a Telephone Call

The screenshot shows a form titled 'Document a Telephone Call'. At the top, there are three icons: a plus sign in a square, a plus sign in a circle, and a plus sign in a speech bubble. The first icon is highlighted with a red box. Below the icons are input fields for 'User' (Herbert Blume), 'Outgoing' (checkbox), 'Date' (01/25/2019), and 'Time' (1:28 PM). Below these fields is a large text area containing the text 'Discussed availability|'. At the bottom left of the form is a green 'Save' button.

Begin by choosing the  **Phone** icon from the tab's *header*. This action will open a menu in the right-hand window:




1. Review the following system-generated entries, and if applicable edit them:
  - User Name
  - Date
  - Time
2. If applicable, check the box for: ☒ Outgoing.
3. Record your notes about the call.

Click the **Save** button, and the listing will be added to the Communication list.


### Filter the Communications Display

After several conversations with a job seeker, it may be beneficial to reduce the accumulated list (in the left *column*) by mode. For other needs, the list can be expanded to include communications with the job seeker across Requisitions, if applicable.

### Show/Hide Job Seeker Communications by Mode


By default, all communication modes —  **Email**,  **Phone**, and  **Text** — are shown on the Communication list. Change the list view by, toggling one, two, or all three of these icons, located in *the column header*, from active to inactive to reduce the list, as needed.

### Show a Job Seeker's Communications for all Requisitions

To the right of the mode icons (described above), click the  **Show All** icon to expand the list to include all job seeker communications, regardless of requisition.

### Send a Text Message



From the *upper toolbar*, choose the  **Add New Text** icon. In the provided field, enter the message. Then press the **Send** button. A copy of the message will be saved to the **Communication** tab.

**Note:** Review the message content carefully. The communication will be visible to all **balanceTRAK** users who have permission to view the job seeker's record.

## Schedule an Interview with a Job Seeker

Profile	Forms	Documents	Communication	Interview
---------	-------	-----------	---------------	-----------

Representing another interactive tool, the **Interview** tab facilitates (a) the scheduling of an applicant interview on the job seeker **Calendar** and (b) associating this meeting with **Interview Forms**. These two logistical components are handled on two **Interview** sub-tabs, accordingly.

Just like with scheduling events on the [requisition Calendar](#), the interviewee and other attendees can be notified about the meeting; the recipients can include the event on an Outlook Calendar; and documents can be attached to the message. For an interview in particular, the job seeker's submitted Application/Prescreener can be forwarded to colleagues, and an Interview form can be attached for completion by the interviewer.

### Add an Interview to the Calendar

Follow the steps below to schedule an interview:

1. Click the **Add Interview** button, located in the *upper toolbar*.
2. Search for and select any additional attendees, as needed. (Your name is included, by default.)
3. Determine the interview date and time (shown below).
  - a. Select the Start and End Date, using the provided calendar. The dates can also be entered in a two-digit month/two-digit day/four-digit-year format.
  - b. Indicate the start and end times, using the provided drop-downs.

The screenshot shows a form titled 'Add Interview' with the following fields and options:

- Start Date:** A date input field showing '01/25/2019' and a time dropdown showing '3:15' and 'PM'.
- End Date:** A date input field showing '01/25/2019' and a time dropdown showing '4:15' and 'PM'.
- Description:** A text input field containing 'Interview'.
- Location:** A text input field containing 'Main Conference Room'.
- Notify Job Seeker:** Two checkboxes: 'Email' (checked) and 'Text' (unchecked).
- Include:** A section with a question mark icon and two checkboxes: 'Prescreener' (unchecked) and 'Application' (checked).

4. Enter a specific Description (required) to aid in identifying the event on the universal job seeker Calendar. Then enter a meeting room or other Location (optional).
5. Under Notify the Job Seeker, the default communication method is: ☒ Email. If this is not applicable, deselect the check box.  
  
Your Implementation may also have an option to send the event information by: ☒ Text.
6. Determine if any job seeker forms will be included. If so, check the box(es) for: ☒ Prescreener, Application (default) AND/OR Other Forms.  
  
**Note:** Only identified internal colleagues will receive any applicant forms.
7. Finally, attach an interview form by selecting one from the provided drop-down.

Click the **Save** button to include the interview event on the system's job seeker calendar.

### Manage Screenings (if installed)

Profile	Forms	Documents	Communication	Interview	Screenings
---------	-------	-----------	---------------	-----------	------------

Located in the Job Seeker detail, the **Screenings** tab serves as a gateway to several integrated third-party providers for background checks or onboarding.

#### Background Check

##### *Before you begin:*

- Your company must have an agreement and on-line account in place with the vendor.
- Depending on the background screening vendor and the type of screening packages your organization has elected to use (e.g., Federal criminal records, credit check), certain information must be collected from the job seeker, via the Application and/or Background Check form.

#### Request Information from the Job Seeker

Like other forms, the Background Check form can be transmitted to the job seeker for completion. However, for continuity the form will be released from the **Screenings** tab > **Background Check** sub-tab. The job seeker will receive an email message with a link to log into the applicant interface and fill out the form.

Begin by reviewing the content of the corresponding email and form templates.

**Cross-reference:** These templates will be managed by your client-side Administrator, if changes need to be made. For information on templates, please refer to **Help > Table of Contents > Settings (for Administrators)**, available on line.

When you are ready to send the form to the Job Seeker, simply return to the **Background Check** sub-tab, and click the **Release Background Check Form** button. The status of the Form will be indicated in the *upper toolbar* as: Released. A copy of the message will also be stored on the **Communications** tab.

Below, the form will display in a PDF viewer, showing the pre-populated and blank sections. When the information from the Job Seeker comes back, the **Background Check** status will update to: Completed on [date]. In addition, the completed form will display.

### Retrieve the Investigation Results

Some screening providers will require you to log into a proprietary portal, outside of **balanceTRAK**, to retrieve results, while others will deliver the screening report through the applicant tracking system.

For vendors facilitating the latter, simply click the **View Results** button to see the results of the background screen. This **View Results** button will become available once the report is ready to be reviewed.

### EMPTrust Onboarding

Berkshire has partnered with EMPTrust to offer an integrated onboarding solution for your company to engage with new employees as part of orientation. For organizations who have signed up for this service, an **EMPTrust Onboarding** sub-tab will be activated in the **Screenings** work area, where some vendor-required queries will display for completion.


On **Submit**, the information will be transmitted to EMPTrust, and a “receipt” will display on the tab. If any further changes need to be sent to EMPTrust, click the **Resubmit** button.

For more information about Berkshire’s background screening and onboarding providers, please contact your Berkshire Account Executive or the Product Support team.



## Record Notes about the Job Seeker

Profile	Forms	Documents	Communication	Interview	Screenings	Approvals	Notes
---------	-------	-----------	---------------	-----------	------------	-----------	-------

Access the **Notes** tab in the Job Seeker detail to store unique information pertaining to the applicant. **Notes** about the job seeker operate in the same manner as they do on the requisition's **Notes** tab.

A note can be added, edited, or deleted; and one can be saved as, or converted to, a task and sent to the  **Dashboard** > [To-Do List](#).

Please refer to that [Notes](#) section of this guide for complete information.

Due Date	Created On	Created By	Note
 	1/25/2019 10:25:00 AM	user@berkshireassociates.com	The job seeker is out of the country until February 5.

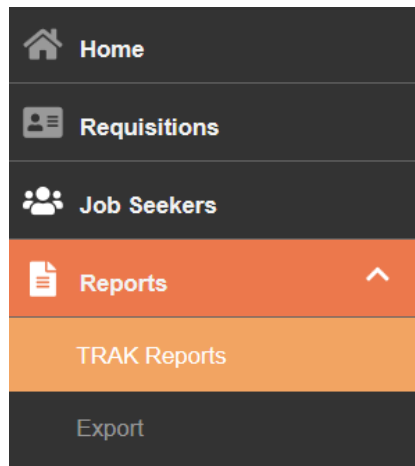
**Quick Tip:** Both **Notes** (above) and **History** logs (described below) can be exported for use outside the system: Initiate the process by selecting the **Export to Excel** icon from the *upper toolbar*.

## Review Job Seeker History

Profile	Forms	Documents	Communication	Interview	Screenings	Approvals	Notes	History
---------	-------	-----------	---------------	-----------	------------	-----------	-------	---------

The **History** table will record the job seeker's activity in the system, such as logging in, completing the Application form, or being sent an automatic email notifications, for some examples. Each history record displays information for the Created On date, Created By user email, Requisition number, and Description.

## TRAK REPORTS



With **balanceTRAK**, you can generate **TRAK Reports** on requisitions and job seekers. This chapter will explain how to:

- Generate **TRAK Reports** that provide snapshots of your recruiting activities and the job seeker pool
  - Apply filters and adjust report settings to configure reports
- **Export** data for further analysis, record-keeping, or other uses outside the system.

Before generating a report or exporting data, review this chapter, and the module, as a whole to make sure you take full advantage of the available settings and tools. *A full list of available reports and a few samples are included in the [Appendix](#) at the end of this guide.*

## TRAK REPORTS

In navigating the **TRAK Reports** module, the first tab presents a table of available **Reports**, along with features for viewing and outputting those reports (as shown on the next page).




The screenshot shows the 'Reports' tab in a software interface. At the top, there are three tabs: 'Reports', 'Filter', and 'Report Settings'. Below the tabs, there is a section titled 'Export reports as' with two radio buttons: 'A Single File' (selected) and 'Separate Files'. Below these is a 'File Type' dropdown menu set to 'Excel' and a green 'Save' button. Below this is a section titled 'Reports' with a 'Global Settings' button on the right. The 'Reports' section contains a table with a 'Select: All, None' link at the top left. The table has two main sections: 'Executive Summaries' and 'Referral Source'. Under 'Executive Summaries', there are four rows: 'Job Seekers', 'Requisitions', 'Open Requisitions', and 'Closed Requisitions'. Under 'Referral Source', there is one row: 'Referral Source Summary'. Each row has a checkbox on the left and a 'View' icon (document with magnifying glass) on the right. The 'Executive Summaries' section also has a 'Settings' icon (gear) on the right. The 'Referral Source' section also has a 'Settings' icon (gear) on the right. The table is highlighted with a green border.

### Selecting Reports


On the left side of the table, each report is accompanied by a blank ☐ check box, enabling the selection of one or more items for output.

In addition, there are global selection All, None links at the top for selecting the whole list or clearing the selection(s), respectively. Meanwhile, each *header* within the table also comes with a blank ☐ check box, for quickly selecting a group of “like” reports.

### View a Report

On the right side, each report can be viewed in a new window by clicking the  **View** icon. From this window, the single report can be viewed at different sizes, printed, and downloaded in PDF.

### Report Groups

As shown in the screenshot above, the report table is divided into sections, demarcated with header bars; in **balanceTRAK**, these are “report groups.” On the right side of the report group header, the  **Settings** icon provides access to specific customization options that are available by report group.

**Example:** Below, the EEO Settings menu provides options for date range, job seeker stage, disposition code, Zip code analysis, and the grouping of EEO counts.

## Global Settings

Again at the top of the table (as shown in the screenshot above), click the **Global Settings** button to include a date footer or a custom footer in all reports.

## Generate Reporting

When you are ready to generate reports – in particular, multiple reports in the default configurations – return to the top of the **Reports** tab to select whether to generate reports as:

☒ **A Single File**

OR

☐ **Separate Files**

Once the desired reports are ☒ selected, click the **Export** button, located below the table.

If you would like to generate more specific reports, please review the **Filter** and **Report Settings** tabs, for more advanced options. These tabs are described next.

## Filter Tab

Available in the **TRAK Reports** *tab header*, the **Filter** tab is the second tab from the left. Filter menus provide options for restricting the report display to one or more particular Requisitions, Hiring Managers, Locations, or data from other fields.

☒ Select a field to see a list of all values available for that field. When running a report, only one field can be chosen at a time.

From the displayed values, ☒ click the check boxes for the individual values you want to include in the filter. As “quick click” options, you can select All OR None, as applicable.

Reports can also be grouped by organizational unit, as applicable. The default setting is: Do not group on a field.

Click **Save** when all options are selected, and you will be brought back to the **Reports** tab, which will now display a filter *banner*. Choose the **View Filter** button to return to filter settings, or click the **Clear Filter** button to remove the current filter.

**Example:** In the menu below, the organization has two levels, from smaller to larger: Department and Location. In selecting a location to filter on, only data from “Baltimore” will be displayed in the report. However, all departments in the Baltimore office will be shown because that unit is a subset of the location.

The screenshot shows the 'Filter' tab interface. At the top, there are three tabs: 'Reports', 'Filter' (which is active), and 'Report Settings'. Below the tabs, the main content area is titled 'Filter reports on the selected field'. It contains a list of radio buttons for selecting a field to filter on: 'Do not filter on a field.', 'Requisition Number', 'Department', 'Location' (which is selected), 'Hiring Manager', and 'Recruiter'. Below this list, there is a 'Select: All, None' link. Underneath, there are three checkboxes for selecting specific values: 'BALT - Baltimore, MD' (checked), 'BUFF - Buffalo, NY', and 'CORP - Columbia, MD'. Below these checkboxes, there are two more radio buttons: 'Do not group on a field.' (selected) and 'Department'. At the bottom of the form, there is a green 'Save' button.

## Report Settings Tab

Using **Report Settings**, the third tab, you can choose the fields to be shown on the following four reports:

- Open Requisitions
- Closed Requisitions
- Applicant Detail
- Requisition Detail

Up to eight fields may be selected to expand the default display.

Select the report from the drop-down menu at the top of the page to display the associated fields. ☒ Check off one or more fields. Click the **Save** button before selecting a different report.

**Example:** Below is a menu of fields that can be selected for the Applicant Detail report:

Choose a report
Applicant Detail

Select up to 8 fields to show on the report:

<input type="checkbox"/> Application Date	<input type="checkbox"/> First Name	<input type="checkbox"/> Last Name
<input type="checkbox"/> Middle Name	<input type="checkbox"/> Social Security Number	<input type="checkbox"/> Race Code
<input type="checkbox"/> Gender Code	<input type="checkbox"/> Email Address	<input type="checkbox"/> Primary Phone
<input type="checkbox"/> Extension	<input type="checkbox"/> Phone Can Text	<input type="checkbox"/> Date of Birth
<input type="checkbox"/> Disposition Code	<input type="checkbox"/> Additional Phone	<input type="checkbox"/> Disposition Date
<input type="checkbox"/> Additional Phone Can Text	<input type="checkbox"/> Street Address	<input type="checkbox"/> City
<input type="checkbox"/> State	<input type="checkbox"/> Zip Code	<input type="checkbox"/> County
<input type="checkbox"/> At This Address Since	<input type="checkbox"/> At This Address Until	<input type="checkbox"/> Other Names (include dates)
<input type="checkbox"/> Driver's License Number	<input type="checkbox"/> Driver's License State	<input type="checkbox"/> Certified
<input type="checkbox"/> Maiden Name (include dates)	<input type="checkbox"/> Acceptance Date	<input type="checkbox"/> Hire Date
<input type="checkbox"/> Job Seeker Stage	<input type="checkbox"/> Referral Source	<input type="checkbox"/> Applicant Type
<input type="checkbox"/> Veteran Status	<input type="checkbox"/> IWD Status	<input type="checkbox"/> Internal Applicant

## EXPORT DATA

Select **Reports > Export Data** from the *side navigation menu* to export data entries from the software in Excel format. Both **Job Seeker** and **Requisition** data are available for export, represented by sub-tabs, respectively:

Export Settings

Job Seeker
Requisition

While selections for Fields and Filters can be applied to fine-tune job seeker data, requisition data can be exported, simply based on Filters for status Category (Pending, Open, Closed).

## Assemble and Export Job Seeker Data

Because job seeker records contain an array of information, menus on the **Job Seeker** sub-tab help you determine what particular data will be collected from **balanceTRAK** for export. By applying Filters and selecting Fields, you can reduce the processing time and have just the information needed for external use.

After selecting the **Job Seeker** tab (circled in green above), review the available options on the **Filters** and **Fields** sub-tabs before making selections.

1. Navigate down the **Filters** tab, menu by menu, and ☒ make check-box selections as appropriate for:
  - a. Location – If applicable, check off one or more units for your organization, such as department or establishment.
  - b. Requisitions – Your organization’s requisitions will be listed by title and identifying number.
  - c. Requisition Category – Pending, Open, Closed.
  - d. Job Seeker Stage – Options to limit the data by recruiting phases are shown (e.g., Unassigned, Application Complete, Hired).
  - e. Disposition Code – Here, selections can be made to limit data by the final outcomes for job seekers (e.g., Not Disposition, Not Qualified, Never Considered – Incomplete Application).

**Example:** Below, all boxes for Requisition Category were checked off. In addition, on the Job Seeker Stage menu, the Select All link at the top was clicked to quickly select all stages:

<b>Requisition Category</b>				
<input checked="" type="checkbox"/> Pending <input checked="" type="checkbox"/> Open <input checked="" type="checkbox"/> Closed				
<b>Job Seeker Stage</b>				
<input type="text" value="Search..."/>				
<a href="#">Select All</a>   <a href="#">Clear All</a>				
<input checked="" type="checkbox"/> Unassigned	<input checked="" type="checkbox"/> Application Complete (00AC)	<input checked="" type="checkbox"/> HR Review (01HRR)	<input checked="" type="checkbox"/> Phone Screen (02PS)	<input checked="" type="checkbox"/> Submit to Manager (03STM)
<input checked="" type="checkbox"/> Reviewed by Manager (04RBM)	<input checked="" type="checkbox"/> Selected for Interview 1 (05SF1)	<input checked="" type="checkbox"/> Interview 1 Complete (061C)	<input checked="" type="checkbox"/> Selected for Interview 2 (07SF2)	<input checked="" type="checkbox"/> Interview 2 Complete (082C)
<input checked="" type="checkbox"/> Offer Extended (09OE)	<input checked="" type="checkbox"/> Offer Accepted (10OA)	<input checked="" type="checkbox"/> Background/Drug Screen Initiated (11BKGI)	<input checked="" type="checkbox"/> Hired (12H)	

2. Move on to date range menus and fields. Where you want to limit the data – Enter the beginning and ending dates, in a two-digit-month / two-digit-day / four-digit-year format. The following ranges are available:
  - a. Hire Date
  - b. Application Date
  - c. Posting Start Date
  - d. Posting End Date

OR

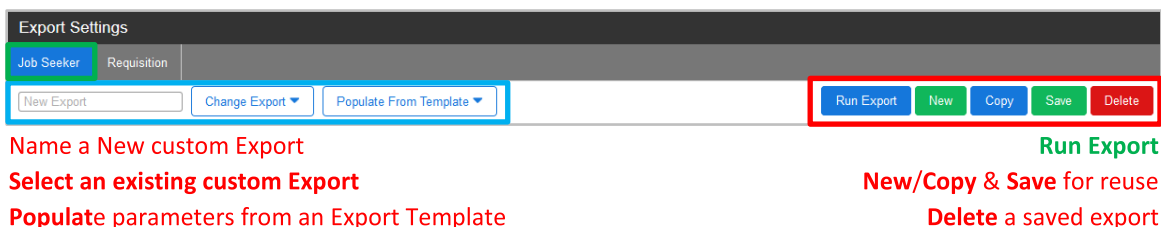
▼ **Expand** the Format drop-down (labeled "Custom"). From the provided drop-down, select a relative date range (e.g., Today), a quarter (e.g., Q1), or a range (e.g., Past X Months).

3. Click the **Run Export** button (shown in the screenshot below), located in the Export Settings *toolbar*, first position. A circular processing bar will display, indicating the system's progress in compiling the export.

**Note:** During this time, click the **Cancel** button to stop the process.

4. An Excel prompt from the browser will display when the compilation is complete, providing options to open or save the file.

As introduced above, the Export Settings *toolbar* supports the export of Job Seeker data, whether you want to run a simple *ad hoc* export, as above, OR apply a default or custom Template to build one:



## Save and Rerun a Custom Job Seeker Export

*Quick Tip:* Before customizing an export, review the preset export templates, available in the Populate From Template drop-down. One of these templates may meet your needs, or with slight editing, form the basis for building the custom export.

If you have a recurring need for a particular job seeker data set, build the parameters and save a custom export template for future use:

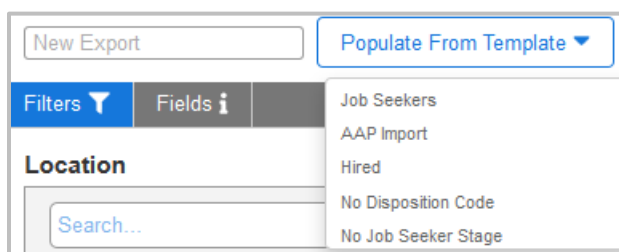
1. Press the **New** button, located in the Export Settings *toolbar*.

2. Enter a name in the New Export field, located in the *toolbar*, on the far right.
3. Then, follow the numbered instructions directly above to export job seeker data, but for step 2, set a relative date range.
4. Click the *toolbar*'s **Save** button. Then click **Run Export** to begin data processing.

The custom export template is now also available to apply at another time. Simply

▼ **Expand** the Change Export drop-down, and select the template.

## Output Job Seeker Data via Export Template



**BalanceTRAK** comes loaded with some pre-configured export templates. These templates may help you meet some recognized needs for data exports, such as transferring job seeker information into another system, preparing an Affirmative Action plan, or performing further research or data work on job seeker subsets.

As shown above, the follow presets are available in the Populate From Template drop-down:

- Job Seekers
- AAP Import (Prepares data for import into Berkshire's **balanceAAP** software)
- Hired
- No Disposition Code
- No Job Seeker Stage

With a template in place, the appropriate menu selections will be made for you. Then, simply **Run (the) Export**, as described earlier in this chapter.

**Reminder:** These preset selections can be edited, and if helpful for future operations, they can be compiled into a custom export, as explained above.

## SETTINGS

### ADDITIONAL HELP FOR ADMINISTRATORS (AVAILABLE ON LINE)

Through the **Settings** menus, an Administrator can set up and configure the numerous features and functions for your organization's **balanceTRAK** environment and users.

Please refer to on-line  **Help**, under **Settings**, for detailed information on:

- Managing **Reference Tables** that support the system's database
- Administering global **Workflow** settings
- Designing the **Job Posting** page
- Configuring the software's **Home page**, including assembling **Dashboard** widgets
- Maintaining a library of **Questions** as building blocks for forms, and updating **Form Templates**
- Storing and editing **Email Templates** for communication with job seekers (and colleagues)
- Building and managing **Requisition Templates** and **Approval Process Templates** for requisitions
- Managing **System** settings, including data Archive dates



## APPENDIX

### GRANT SCREEN ACCESS TO BERKSHIRE PRODUCT SUPPORT

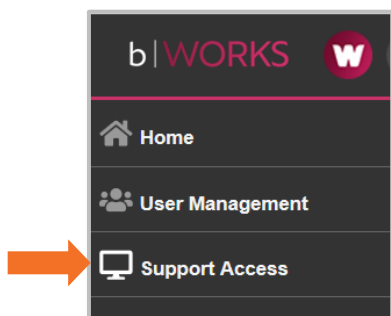
If you require technical assistance from Berkshire, it may be helpful to give Berkshire permission to view and edit the screen while providing support. Our Product Support representative may ask you to turn on this setting while interacting with you. For your peace of mind, this permission is granted on a timeframe basis.

**Note:** If you do not have **User Management** permissions in the system, please contact your client-side Administrator for assistance in turning on this feature.

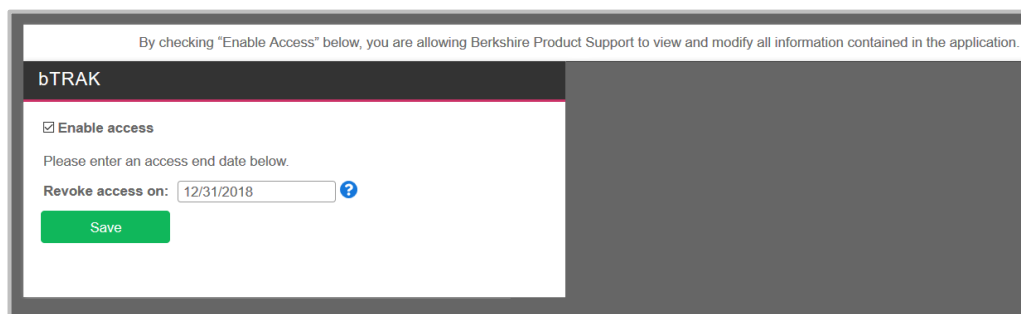
1. Navigate to  **balanceWORKS** >  **Home** by selecting the circular “w” icon from the *software header bar*.



2. Then, from the expanded the *side navigation menu*, select **Support Access**.




3. In the menu for the **bTrak** product, complete the following menu items:
  - a. Check off: ☒ Enable access.
  - b. Enter a date in the field next to the tagline: Revoke access on ...
  - c. Press the **Save** button.

A screenshot of the 'bTRAK' configuration screen for 'Enable Access'. At the top, a message states: 'By checking "Enable Access" below, you are allowing Berkshire Product Support to view and modify all information contained in the application.' Below this, the 'bTRAK' header is visible. The main content area has a white background and contains the following elements: a checked checkbox labeled 'Enable access', a text prompt 'Please enter an access end date below.', a label 'Revoke access on:' followed by a text input field containing '12/31/2018' and a blue question mark icon, and a green 'Save' button at the bottom.

This feature may be edited at any time.

## ARCHIVE SETTINGS

System					
Ineligibility	Default User Settings	Archive	Application	User Access Levels	Templates
Archives	Automatic Archive Settings				

**BalanceTRAK** employs an archiving process to improve system operation, while also allowing the client organization to maintain access to date. The client-side Administrator can manage this process at:  **Settings > System > Archive**. As part of system administration, this task area is comprised of:

- **Archives** – Where collected “legacy” files are stored prior to archiving and available for export
- **Automatic Archive Settings** – The control center for managing data retention and the archive date

### About the Default Automatic Archiving Process

The default archiving process relies on a Requisition’s Close Date to initiate the following actions —

1. When a Requisition’s Status is changed to Closed, the system will generate a Close Date, starting the “clock” on the data retention period.  
  
By default, **balanceTRAK** will display a Closed Requisition and associated job seeker information for **three years, or 36 months, after the Close Date**.
2. The archiving scan will run annually on a specified date, collecting files whose “clocks” have run out. The archived data will be stored as linked files on the **Archives** tab for an additional time period, typically an **additional 90 days**.

At any time prior to archiving, the archive file can be exported for storage outside the system.

**Important Note for Federal contractors** — **BalanceTRAK’s** default archive setting meets Office of Federal Contractor Compliance Programs (OFCCP) requirements for recordkeeping.

## Customize Automatic Archive Settings

Archives
Automatic Archive Settings

### Archive Dates

Automatically create archives for data that is older than  months.

Archive data on   annually.

Keep archives for  days.

### Data Archive Field

☒ Requisition Closing Date

☐ Application Date

To adjust the default settings, access the tab for **Archive Settings > Automatic Archive Settings**.

Under Archive Dates, make entries for the following:

- Automatically create archive for data that is older than [Number of] months.
- Archive data on [Month / Day]
- Keep archives for [Number of] days

Then, using the radio buttons —


- Specify field to use for data archives: Requisition Closing Date or Application Date

Click **Save** if any adjustments have been made.

## Perform Archiving and Export Archived Data

For Administrators who would like to Archive data, a “manual” process is available on the **Archives** tab.

Archives
Automatic Archive Settings

Archive Created	Archive Data Up to	Size	Status	Type
 2/19/2018 4:26:26 PM	2/1/2017	903.0 KB	Completed	Manual

### Manual Archive

☒ Automatically remove data from bTRAK once the archive file has been created.

Archive Information up to  (date must be at least one year ago)

### Create an Archive

**Caution:** By default, a check box will be ticked to: ☒ Automatically remove data from **balanceTRAK** once the archive file has been created. Before performing archiving, consider whether the data should remain in the system OR be removed.

Then, enter a date that is at least one year prior to the current date in the provided field, before clicking the **Create Archive** button.

### About Archive File Storage

Regardless of whether the archive is performed automatically or manually, the Archive file will be added to the **Archives** list (as shown above), identified by Archive Create Date, Archive Data Up to (Date), (File) Size, Status, and Type (Automatic or Manual).

### Export the Archive


Create an export file by clicking the link for the archive entry. Then follow the Windows prompts to open and/or save the Zip file.

### Contents of the Archive Export

The Archive's Zip file will contain the following elements:

- Requisition Information
  - Excel file, containing Requisition Information field entries by Requisition
  - CSV files, containing Requisition, Job Seeker History
  - PDFs of the Job Descriptions, labeled by Requisition
- Job Seeker Information (by Requisition)
  - Excel file, containing Job Seeker ID, Name, Email, Phone Number, Date Applied, Stage and Status for each Job Seeker
  - PDFs of all completed Forms
  - PDFs of submitted Resumés

### Delete an Archive File (Prior to System-generated Removal)

Click the  **Delete** button to the left of the Archive Created Date to remove the legacy data file from the system.

## LIST OF BALANCETRAK REPORTS

For a full list of currently available reports, see the **balanceTRAK > Reports** tab.

### **Executive Summaries**

- Job Seekers
- Requisitions
- Open Requisitions
- Closed Requisitions

### **Referral Source**

- Referral Source Summary
- Referral Source Summary for Individuals with Disabilities
- Referral Source Summary for Veterans
- Referral Source Summary by Applicant Status

### **Requisitions**

- Open Requisitions
- Closed Requisitions
- Requisition Detail
- Drop Off Rates

### **Job Seekers**

- Job Seekers by Requisition
- Hires

### **EEO**

- Applicant Detail
- Applicant Summary
- EEO Counts
- Job Seeker Zip Code Analysis

### **History (for System Administrators)**

- Requisition History
- Job Seeker History
- User History
- Search History

### **User Access (for System Administrators)**

- User Access Log
- User Permissions
- User Permissions Log
- User Profile Logs

## SAMPLE BALANCETRAK REPORTS

## Executive Summaries: Open Requisitions

Acme Technology Corp						
Open Requisitions Executive Summary						
<b>CASN</b>		<b>California</b>				
Average Job Seekers per Requisition: 5.5				# of Open Requisitions: 2		
Requisition Number	Job Title	Status	Posting Start Date	Days Open	# of Job Seekers	Number of Positions
CASN-CTM365-2014-01	Buyer II (CTM365)	Accepting Applications	04/14/2014	14	3	1
CASN-MIS770-2014-01	Network Analyst I (MIS770)	Accepting Applications	04/14/2014	14	8	2
<b>DCCV</b>		<b>DC</b>				
Average Job Seekers per Requisition: 3				# of Open Requisitions: 1		
Requisition Number	Job Title	Status	Posting Start Date	Days Open	# of Job Seekers	Number of Positions
DCCV-HRM245-2014-01	Benefits & Comp Analyst I (HRM245)	Accepting Applications	04/14/2014	14	3	2
<b>DCSQ</b>		<b>DC</b>				
Average Job Seekers per Requisition: 1				# of Open Requisitions: 1		
Requisition Number	Job Title	Status	Posting Start Date	Days Open	# of Job Seekers	Number of Positions
DCSQ-FNC150-2014-01	Accountant IV (FNC150)	Accepting Applications	04/25/2014	3	1	1

## Job Seekers by Requisition

**Acme Technology Corp****Job Seekers by Requisition****1:FNC170:07****Accountant I**

Name	Email Address	Phone Number	Applicant Status	Application Date	Referral Source	Applicant Type	Veteran Status	Score
JENNIFER TOMSON	tomso@berkshireassociates.com	301-222-4444	Not Assigned	12/16/2013	Customer Referral	External		90.00
CELEST BILLIARD	trak3@berkshireassociates.com	301-222-4444	Not qualified (02)	11/06/2013		Internal		63.33
TOM CARNE	berkassociates@gmail.com	301-222-4444	Hired (01)	10/23/2013	Employee Referral	External		96.00

**1:FNC170:17****Driver**

Name	Email Address	Phone Number	App Stage / Disposition Code	Application Date	Referral Source	Applicant Type	Veteran Status
Jill Freeman	berkassociates@gmail.com	301-222-4444	Set up 1st Interview (03)	03/19/2014		External	
Paul Gorman	berkassociates@gmail.com	301-222-4444	Not Assigned	03/19/2014	Craigslist - Craigslist	External	YES

## EEO Counts

Acme Technology Corp			
EEO Counts by Requisition Number			
1:FNC170:07		Accountant I	
Applicant Status	Race	Gender	# of Job Seekers
Not Assigned	Asian	Male	1
Not Assigned	Asian	Female	1
Not Assigned	White	Male	1
Not Assigned	American Indian	Male	1
Not Assigned	Unknown	Unknown	5
Hired (01)	White	Female	1
Not qualified (02)	Black	Female	1
Not qualified (02)	Unknown	Unknown	1
Not qualified (02)	White	Female	1
Set up 1st Interview (03)	Black	Male	1
Set up 1st Interview (03)	Hispanic	Male	1
Set up 1st Interview (03)	Unknown	Unknown	2
Group Totals			17
10:1064:07		Accountant II	
Applicant Status	Race	Gender	# of Job Seekers
Not Assigned	Asian	Female	1
Not Assigned	White	Male	2
Hired (01)	Hispanic	Male	1
Waiting for Background Check (06)	Unknown	Unknown	1
Group Totals			5